Oracle® Retail Order Administration Cloud Service

Classic View Online Help

Release 24.1.101.0
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Oracle Retail Order Administration Cloud Service Classic View Online Help, Release 24.1.101.0

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Preface

Documentation Accessibility

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

Access to Oracle Support

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

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

https://support.oracle.com

When contacting Customer Support, please provide the following:

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

Oracle Help Center (docs.oracle.com)

Oracle Retail Product documentation is available on the following website https://docs.oracle.com/en/industries/retail/html

Comments and Suggestions

Please give us feedback about Oracle Retail Help and Guides. You can send an e-mail to: retail-doc_us@oracle.com

Oracle Retail Cloud Services and Business Agility

Oracle Retail Order Administration is hosted in the Oracle Cloud with the security features inherent to Oracle technology and a robust data center classification, providing significant uptime. The Oracle Cloud team is responsible for installing, monitoring, patching, and upgrading retail software.

Included in the service is continuous technical support, access to software feature enhancements, hardware upgrades, and disaster recovery. The Cloud Service model helps to free customer IT resources from the need to perform these tasks, giving retailers greater business agility to respond to changing technologies and to perform more value-added tasks focused on business processes and innovation.

Oracle Retail Software Cloud Service is acquired exclusively through a subscription service (SaaS) model. This shifts funding from a capital investment in software to an operational expense. Subscription-based pricing for retail applications offers flexibility and cost effectiveness.

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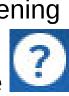
Getting Started

About Oracle Retail Order Administration

Oracle Retail Order Administration Cloud Service (OA) manages direct-to-consumer orders, whether they are taken on the website, contact center, or in the retail store.

About this Online Help

The **Classic View Online Help** describes how to perform the functions available within the entire order process from creation to shipment, and allows customer service representatives (CSR) to manage the exceptions. The online help is available from the help button in each fast path such as from Customer Service OIOM. The help in the application is context sensitive meaning that if you click on the  icon whilst further into the application and not the home screen, the opening page opens to that section of help and not the Contents page. For example, clicking the  icon from Order Inquiry window opens the section of help for OIOM.

To complement the online help there are four guides associated. Direct hyperlinks to these guides are linked from within the online help.

- The Reports Guide describes the contents of each report and includes links to sample reports.
- The Technical Guide provides more detailed information to supplement the content in the online help.
- The Implementation Guide includes information on configuration options, such as defining properties. The system control values (SCV) are documented in this guide.
- The Integration and Import/Export Guide provides the details of Oracle internal integrations, imports and exports, such as Oracle Retail Customer Engagement (ORCE) and Order Orchestration (OO) integration, and external integrations such as Avalara AvaTax, and Experian EDQ address API.

Contents of the Online Help

The online help consists of the following chapters. Click on a link to go directly to the topic for more information.

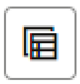
- Configuration and Administration: includes troubleshooting and FAQ's.
- Accounting Setup: includes general accounting setup.
- Customer Service: includes customer maintenance, order inquiry, order maintenance, returns, backorder and soldout process, refunds, and memberships.
- Fulfillment: includes pick slip generation, drop ship processing, Order Orchestration Drop Ship Manager integration, and shipment confirmation.

- Installation Setup: includes system control values, number assignment, and secured features.
- Marketing: includes promotions, source code and offer setup, and list management.
- Merchandising: includes item maintenance and purchase order maintenance.
- Order Entry: includes the generic order API.
- System Operations: includes utilities, periodic processing, authorizations and depositions, the e-commerce interface, stored value cards, the point-of-sale integration, and Order Orchestration integration.
- Warehousing: includes purchase order receiving and warehouse management.

Navigating within the Online Help

There are several ways to get about within the online help. You can:

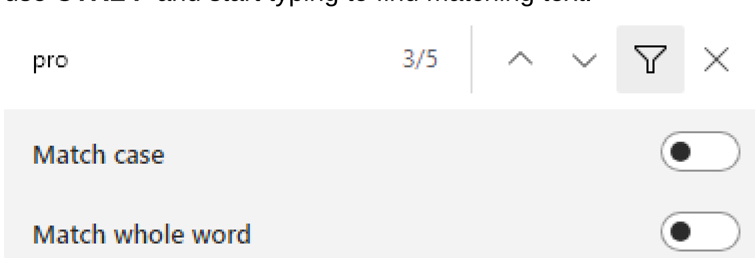
- select the **Table of Contents**

  icon on the top right of the page. Drill down or expand the chapters. Right clicking allows you to open the link in a new window or tab.
- use the **Previous Page** and **Next Page** buttons at the bottom of each page to move through the help one page at a time.
- enter text to search in the **Search**

  field at the top of the screen.
- use **CTRL F** and start typing to find matching text.

  Find looks for text on the current page only. The filter allows you to select to match the case and/or word. The arrows allow you to rotate between the results.
- click on an external link to go direct to another associated guide.

Quick Links

For information on:	See:
Using the System Control table, including how to set up and change values	System Control Table Components
A particular system control value	System Control Values

For information on:	See:
Secured features	Setting Up Secured Features
Options available at this home screen such as Quick Find Options: Fast Path, Menu selection, meaning of icons, and so on.	Menu Driver Screen

Where to Look for Additional Help

A variety of guides provide you with complete information about Oracle Retail Order Administration. If you navigated to the help from the application, you can access the main Order Management Suite Cloud Service documentation page from here. Additional guides provide supplemental information.

- Omnichannel Web Service Authentication Configuration: MOS ID 2728265.1
- Web Services Guide and Order Maintenance Web Services Guide: MOS ID 2953017.1
- Security Guides: MOS ID 2953017.1
- Technical References (includes Reporting Guide): MOS ID 2953017.1
- Data Models: MOS ID 2910995.1
- Documentation for other retail products: https://docs.oracle.com/en/industries/retail/index.html

2 Glossary

Accompanying items are added to the order automatically at no charge or for a set price when the customer orders the originating item, or “trigger item”, in a specific quantity and for a specific offer. This activity is automated, so that the order entry operator does not have to remember to add this item to the order. No pop-up window opens to notify the operator that the system is adding an accompanying item to the order. In addition, certain updates to the originating item in order entry also update the accompanying item. When you ship the order, the system ensures that the originating item and accompanying item ship together.

Additional charges are user-defined types of charges that you can add to an order for any reason. You might establish standard additional charge codes for freight fees, special handling charges or rush shipment fees. You might also establish standard credit types of additional charge codes to reimburse the customer for long-distance telephone calls or postage fees.

Address verification services help to reduce the fraudulent use of credit cards by verifying that the billing address on the credit card is legitimate.

Advanced queuing allows you to send messages between Order Administration and other applications using database-integrated message queuing.

Application areas categorize related functions, such as all functions that relate to the Purchase Order application area, Inventory application area, Order Entry application area, etc.

Application groups further define the functions within an application area. An example of an application area may be O/E (Order Entry); an example of an application group within the O/E application area may be FRE (freight).

Arrival date is the date when the customer wants to receive the order. This date controls whether the system reserves inventory and prints pre-generated picks immediately.

ASYNC (background) jobs are used to process the non-time sensitive table updates, such as analysis and reporting updates, associated with transactions that are processed throughout the day in the following modules: Order Entry, Order Maintenance, Purchase Order Maintenance, Purchase Order Receiving, and Billing.

Automated inventory transactions allow you to process inventory transactions across companies. This is useful if you use Inventory Sharing (A69) and you wish to move inventory from the sharing company (which uses inventory located in another company) to the shared company (where you actually maintain the inventory). However, you can still process automated inventory transactions without using inventory sharing.

Best way shipping in order entry can either display a window enabling the order entry operator to offer a choice of shipment options to the customer, or have the system automatically select the ship via with the lowest overall shipping charges.

Billing addresses are addresses where you send the invoice for an order.

Bill-to customers are people or businesses that are billed for the order. This type of customer exists when a business order is placed that will be paid “on-account.”

Brokered backorder: Use the brokered backorder integration with Order Orchestration to automatically send backordered lines to the Order Orchestration module in Order Orchestration for fulfillment.

Buyers are eligible to create purchase orders and may be assigned to purchase specific items. A record must be established on the system for every buyer. The Buyer table is required in order to use the Purchase Order function.

Cache: A store of information that will be required in the future, and can be retrieved quickly. Order Administration uses caching to store recently used information from the Order Administration database in a place where it can be accessed quickly, rather than accessing the database, in order to improve performance. Caching occurs across all Order Administration companies; if you use multiple application servers, you can specify which servers share the same cache. For example, you should have all of your test servers share the same cache and all of your production servers share a cache that is different from the cache assigned to your test servers.

Cancel date is the date when the customer wants to cancel an order if it has not been shipped.

Companies are single, isolated set of tables and data: an organization of financial information, inventory, and customers. Essentially a company has a completely separate database from other companies.

Contact Center is a module of Order Administration where you can review and maintain orders. Contact Center is available in OACS Modern View.

Contact Center: A component of Modern View that provides the ability to create, work with, or review orders.

Credit card authentication services help to reduce fraud and chargeback volume on card not present transactions by requiring the cardholder to enter a card authentication password on the web storefront. The authentication password is sent to an authentication service, such as Visa's Verified by Visa program or MasterCard's SecureCode program, to verify the cardholder's identify and ownership of the credit card during the online purchase.

Credit card net exchange billing allows the system to hold the credit invoice for a return to net it against the debit invoice for the associated exchange in order to reduce the number of transactions that occur for an exchange. The system uses the system-delivered EXC Net Billing for Exchanges deferred payment option to determine how long to delay billing the customer's credit card, based on the invoice date and the # of days for deferral defined for the EXC payment option.

Credit card number formats allow you to specify which digits of a credit card number are masked on Order Administration screens and reports using a special character, such as an asterisk (*). For example, you may wish to mask all but the last 4 digits of a 16-digit credit card number: ************1111.

Credit card security services (CID, CVV2, CVC2) help to reduce the fraudulent use of credit cards by verifying that the credit card is present at the point of sale and to ensure that the credit card security value from the transaction matches the security value stored by the service bureau for that card.

Customer action notes are messages about a customer issue or problem that you need to resolve. You use customer action reason codes to identify and group the issues or problems in customer action notes or track when and how often customers report certain issues or problems.

Customer Engagement Loyalty Integration allows you to register customers in the Oracle Retail Customer Engagement loyalty program. Once a customer is registered in the loyalty program, you can retrieve the customer's loyalty points and awards balances, accrue points from completed purchases, and redeem awards as a pro-rated merchandise discount on an order.

Customer Engagement Stored Value Card integration allows you to process stored value cards between Order Administration and Oracle Retail Customer Engagement using point-to-point communication. Processing of stored value cards remains the same in Order Administration; however, in this integration, Order Administration uses Oracle Retail Customer Engagement APIs to send the stored value card transactions directly to the Oracle Retail Customer Engagement system for processing.

Customer ownership allows you to capture and confirm information about the products a customer currently owns or previously owned. You can use this information to determine trends in the products a customer purchases and recommend related products for purchase.

Customer Price Group Best Price Comparison determines if the customer price group defined in the Customer Price Group Code for CPG Pricing Only (L58) system control value provides a better price than the customer price group assigned to the sold to customer on the order.

Customer profiles let you define the demographics you want to capture for your customer base and define the valid responses for these categories. You can also establish default codes that represent the most common profile characteristics of your customer base. For example, assume that a profile for marital status includes married, single, divorced, etc., as valid options, and that the majority of people who place orders are single. If you set a profile default for the single option, this value appears on new customer orders. You would then need to perform data entry in the marital status field for new customers only if the customer were not single.

Default messages are standard order or gift messages that you enter on orders on a regular basis. Instead of requiring users to retype a standard message on each eligible order, you can have the user select the message from a list of standard messages to default to the order, allowing you to avoid typographical errors that can occur when the message is manually added to the order. You can create default messages for order level messages and line level messages. When a user selects a default message to add to an order, the message text defined for the default message defaults to the Message field and the print code defined for the default message defaults to the Print field; however, the user can still override the default message text and the print code or add to the default message text. For example, if a user selects to default Happy Birthday, the user may wish to modify the message line to read Happy Birthday, Mom! Love, Alex and Beth.

Deferred payment plans are payment plans that allow a customer to pay at a later date, for example, Payment due on January 1st or can be a rolling date, for example, Payment due in 30 days.

Drop points represent locations to which merchandise will be shipped from your warehouse. Typically, a drop point represents the address of a UPS facility. This drop point prints as the return address on the pick slip and is the destination to which undeliverable packages are returned.

Drop ship items are items that you do not stock in inventory. When a customer places an order for a drop ship item, you order the item from your supplier (vendor). The vendor ships the item directly to your customer.

Dunnage weight is the weight of packing materials. Use the Work with Dunnage Weight menu option to define the weight of dunnage based on the cube of the items on a pick slip.

Experian Data Quality (EDQ) Address Validate API, formerly known as the QAS Pro On Demand Service, allows you to retrieve address information from Experian's Address Validate API to update an Order Administration address during interactive quote or order entry/maintenance, the order API, catalog requests, the customer API, and customer maintenance. The Address Validate API captures, cleans, maintains, and enhances address records and validates the address data against national postal authorities, such as the U.S. Postal Service. This is an on-demand, SaaS solution hosted by Experian Data Quality.

External payment service is a RESTful web service that provides an interface from Order Administration for sending credit card and stored value card transactions and receiving responses. Using this service, you can build a custom payment processor that maps to your payment provider.

Finished goods are items that require assembly prior to picking and packing. A finished good is made up of one or more components. These components are assembled to build the finished good. The finished good is picked and packed, not the individual components. The system tracks the usage of each component and will recommend re-order quantities. The system also determines demand for the finished good item and recommends the number of finished goods to be made up to meet demand.

FOB (freight on board) address is the location where title to merchandise being shipped passes from the seller to the buyer. If the FOB address is an Origin type, ownership of the merchandise passes from seller to buyer at the origin of the shipping route, and the buyer is responsible for transportation costs and risk of loss or damage from that point. If the FOB address is a Destination type, ownership of the merchandise passes from seller to buyer at the receiving point for the merchandise, and the seller is responsible for transportation costs and risk of loss or damage until the merchandise reaches its destination.

Freight by order weight involves calculating the freight charges for an order by evaluating the number of cartons you expect the order will require to ship, and the weight of each carton. The tables you create with this function define the freight charges to add to an order based on the weight of each carton.

Generic retail integration from an external system into Order Administration allows you to keep merchandise information in Order Administration in sync with merchandise information in your external merchandising system. Using this integration, you can provide your customers with a consistent shopping experience across your retail store, catalog, and online channels. You can carry the same merchandise and offer your customers the same merchandise pricing in your retail store, catalog, and online channels. This allows you to maintain the image and service levels customers have come to expect.

Ghost customers are customers whose records have been merged with the records of matching customers when you performed a merge/purge.

Gross profit margin is used to determine the profit of an item on an order based on the item's selling price, or to determine the profit of an entire order. This calculation is helpful if your operators are allowed to negotiate prices and work on a commission basis.

Hazard codes identify hazardous items and indicate if special storage and/or handling is required. You assign a Hazard code to an item in Work with Item/SKUs.

Indicia messages are messages you enter to print on the pick slip, such as shipping instructions or notes to the carrier. The indicia message that displays is determined by the drop point associated with the ship via for an order. The drop point associated with the ship via for an order depends on whether or not you are using the Zone skipping feature in Pick Slip Generation.

Installment payment plans are payment plans that allow a customer to pay a specific amount of the payment each month. The date of the payment is due can be a fixed day of the month, for example, Installments due on the 25th of each month, or based on a specific interval, for example, Installments due in 30-day intervals.

Item category codes classify and group similar items on a level below Item Class. For example, you can assign a group of items within the same item class an Item category of “printers only” to differentiate printers from the other items under that item class.

Item ship via overrides are the shippers that can be used to deliver a particular item to its destination, even if the other items on the order are delivered by another ship via.

Items are units of inventory that are defined to the system by item codes. The item code consists of the code itself and, optionally, a SKU, which allows you to define the item further by characteristics such as color, size, etc.

Line of business assignments represent the entity, division, or offer, or combination of these three values assigned to a line of business. The assignment determines which line of business the system assigns to an order in order entry. The system uses a line of business assignment to group all orders associated with a specific line of business together.

Lines of business represent clients, or business units, in Order Administration. Each line of business contains assignments that represent a specific entity, division, or offer, or a combination of these three values.

List sources are codes used to identify segments of a list of names rented from a list broker.

Long Running Jobs Monitor watches the batch jobs running on the Job Management Screen and sends a Long Running Job Email to a specified email address if a job runs without ending longer than a specified time.

Match codes are unique customer identification codes that consist of selected portions of a customer name, company name, and address information. The system generates a match code for each customer based on positional field contents you include in a match code schematic or algorithm. You can create up to four match codes per customer, including a standard match code and three fraud identification match codes.

Merchandise locator searching: This integration with Order Orchestration provides a way to search for a location across the enterprise where the customer can pick up an item. This option is available in item availability, order entry, and order maintenance. The results are informational only.

Misships are items that were inadvertently shipped to your customer. When you process a misship through return authorizations, you add a record of the item to the order and process other updates, such as receipt into inventory, as required. Misships differ from regular returns, in which you process a return against an item that was already on the order. Misship returns cannot be credited, since they were not billed. However, the system updates the Date credited field in the RA Header table to indicate a pending credit does not exist.

Modern View: OACS Modern View is a separate component of Order Administration and includes the Contact Center. Your user configuration controls whether you advance automatically to Order Administration or Modern View when you first log in.

OAuth is a standard for web service authentication through the use of temporary access tokens rather than passwords. With OAuth authentication:

The requesting system first passes a client ID and a client secret to an authenticating service, such as IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management).

The authenticating service, such as IDCS or OCI IAM, generates a temporary token.

The requesting system submits the token, along with the client ID, to the destination system, rather than a password and user ID as with basic authentication.

The destination system validates the token and client ID with the authenticating service.

Oracle Retail Customer Engagement Batch Customer and Sales Integration allows you to send merchandise hierarchy, item, customer, sales and return information from Order Administration to Customer Engagement. Sending this information to Customer Engagement provides a centralized view of the customer's value across your enterprise. You can use this information to perform data analysis, or segmentation, in Customer Engagement.

Oracle Retail Order Orchestration's Supplier Direct Fulfillment is a module of Order Orchestration that provides a collaborative, browser-based environment for retailers and vendors to share order, customer, and shipping information related to drop ship processing, and to automatically process drop ship orders. Order Orchestration is an Oracle application that also provides distributed order fulfillment through its Order Orchestration module.

Order batching allows you to review, correct, and accept orders received from an external system that are in error.

Order Orchestration: Integration with the Order Orchestration module in Order Orchestration supports fulfilling orders across the enterprise.

Order line activity codes define the type of activity, such as a shipment or return, performed against an item on an order line. You can review the activity performed against an item on an order line on the Display Order Line History Screen. You can use the Work with Order Line Activity Codes (WOLA) menu option to review system-delivered order line activity codes and to also create user-defined order line activity codes.

Order ship-to addresses are addresses that are attached to orders you are entering, but which are not saved as permanent mailing addresses for customers.

Order/Call Disposition Activity allows you to track the calls that come into Order Administration from an external order call center. In addition, you can track the reason why a call was terminated or an order was rejected. You can use the order/call disposition activity in Order Administration to match the calls taken in Order Administration against the call history in the external order call center.

Outbound interface trigger rules are the criteria a transaction must meet in order for the system to create an IL outbound trigger. For each outbound process, you can create trigger rules for certain tables. For example, you can create trigger rules for the Item table and SKU table to control the Item Outbound job. If you enter more than one criterion, the record must meet all of the criteria in order to generate a trigger.

Pay plans are deferred payment or installment billing options you can offer to your customers. Under a pay plan, you delay billing the customer's credit card for a prearranged interval.

Pending warehouse locations are locations that were created by the Location Generator in a deferred status. These records are created in a deferred status when you want to review and modify location information before updating the permanent Location Table.

Periodic functions are jobs that you need to run periodically, usually on a daily, monthly, or yearly basis. Periodic functions include reports listing or summarizing activity in a particular area of your business, reports providing current status information on your business, periodic resets, and aging operations.

Periodic processes are jobs consisting of one or more periodic functions that run on a daily, weekly, monthly, or yearly basis.

Permanent shipping addresses are address that are kept on file for the sold-to customer. An example of a ship-to address would be the customer's work address. The system adds a separate record to the Ship-to Customer table for this shipping address under the customer number. You can define up to 999 permanent shipping addresses for one customer.

Physical stored value cards are physical cards that you can stock in a warehouse or retail location. Physical stored value cards are reserved on an order based on available inventory and printed on a separate pick slip from the other items on the order. You must assign a number to the physical card before the card can be billed. Once the card receives an approved activation from the service bureau, the system delivers the physical card to the recipient card holder on the order. In addition, an email may be sent to the recipient card holder, notifying the customer that the physical card is in the process of being delivered.

Pick processing days are the number of days it takes your company, on average, to pick, pack, and ship an order. This is your internal lead time. The system uses this number to determine when to generate a pick slip.

Pick Slip Allocation determines the locations where the system pulls stock in order to fulfill the pick slips in the pick slip generation run.

Pick slip preparation prepares an order for fulfillment when you create or change an order, such as creating pre-generated picks in the Pick Control Header and Pick Control Detail tables and defining whether the pre-generated picks require authorization. Preparing the order for pick slip generation in advance reduces the time it takes to run Streamlined Pick Slip Generation (WSPS) to fulfill and print the picking documents.

Pre-generated picks are picks created prior to running pick slip generation for an order. The status of a pre-generated pick is either G Generated No Authorization, indicating the pick requires authorization during pick slip generation, or H Generated Has Authorization, indicating the pick can bypass authorization during pick slip generation. Pick slip generation selects pre-generated picks to fulfill and print based on the pick slip selection criteria specified.

Price codes allow you to define a price discount for items/SKUs in a specified offer or source code when you order a specified quantity. The price code can offer a dollar or percentage off the price of the item, a special price for the item, or a group price for a defined group of items. The system applies price code pricing to an order during repricing and end-of-order pricing.

Price tickets are labels you attach to items that you wish to transfer to a retail store. The ticket contains information such as the item number and SKU, retail price and outlet price. A barcode prints on each label so you can scan the label information automatically into your system.

Pricing Upload Interface allows you to upload Special Pricing by Source records and Quantity Price Matrix Detail records from an external system.

Primary email address: The primary address is the one displayed on most screens, such as in customer inquiry and in catalog requests.

Primary primary: The primary location stored in the Primary location field in the SKU table.

Promotional pricing allows you to specify an item, a group of items, or a dollar amount that a customer must order to receive an incentive item at no charge or at a special price. Promotional pricing is defined for a source code or offer. When the customer meets the eligibility requirements established in the promotional pricing record, a pop-up window appears in Order Entry allowing the customer to select from an incentive group or select an incentive item. The system automatically adds the item to the order.

Properties define system-wide configuration settings for Order Administration.

Protected: the quantity of the item that can be reserved only through Interactive Reservation.

Purchase order layering updates the expected delivery dates for items on backorder, based on records in the PO Layering table. The oldest orders on the system receive stock before new orders.

Quoting allows you to create a pre-order for a customer listing the items the customer wishes to order and the estimated order totals should the customer agree to place the order. The system does not reserve inventory or perform background async updates for the quote until it is converted to an order. Optionally, the system assigns an expiration date to a quote, indicating how long the estimated quote is valid before it expires.

Recipient orders are secondary orders that you add to an order to ship to a different address. For example, you can place an order for yourself and a friend in a single phone call, on a single order. The system assigns the first order an order number, you enter name, address, item, and payment information for this order, and then select Accept/Add Rcpt to accept the current order and add a recipient order.

Recipient orders are secondary orders that you add to an order to ship to different customers or addresses. For example, you can place an order for yourself and a friend in a single phone call, on a single order.

Regionalization is the process of creating software that is able to be translated more easily. Changes to the code are not specific to any particular market. Order Administration supports multiple decimal and thousand separators as well as multiple date formats.

Reserved: the quantity of the item that is already set aside for other orders.

Retail pickup or ship-for-pickup order: Order Orchestration sends a retail pickup order or ship-for-pickup order to Order Administration for fulfillment when the customer would like to pick up the order at a retail location. The ship-to address on the order sent to Order Administration for fulfilment is the name and address of the pickup store location. If Order Orchestration sends a ship-for-pickup order to Order Administration for fulfillment, the system treats the ship-for-pickup order the same as a retail pickup order.

Sectional Center Facility (SCF) codes represent the first 3 digits of the destination postal (zip) code. The Work with SCF function allows you to enter information specific to the SCF, including the valid states, the preferred method of shipping to this area, and a warehouse list which defines a hierarchy for reserving merchandise in warehouses.

Secured features are procedures or functions that occur within a function, such as the ability to maintain batch totals within Order Entry.

Sets are a group of items which are assembled when the set is picked and packed. Sets can be made up of items which are sold individually. Each of these component items appear on the pick slip and are packed together. Component items might not appear on the same pick slip, but the picks are created at the same time.

Ship via lead days, as defined in the Working with SCF/Ship Via Values (WSHV) menu option, represents the number of days it takes a shipper to deliver the order to its destination. The SCF represents the first 3 positions of the destination postal code. To retrieve the correct ship via lead days, the system uses the ship via on the order line (or order ship it not defined at the line level) and the SCF (first 3 digits of the postal code) and country code defined for the order ship to delivery address.

Ship-for-pickup order: Use the ship-for-pickup integration with Order Orchestration to send the merchandise for an order to a designated store, where the customer can pick it up. Order Orchestration integration facilitates communication between Order Administration and the designated store location, so the store receives notification that the order is in transit, and sends notification back to Order Administration after the merchandise is received and when the customer picks up the order.

Ship-to customers are people receiving the merchandise. This may be the sold-to customer, the recipient of a gift, the address of a business or an address used for this order only.

SKU Sort Sequence Numbers are sequence numbers assigned to SKUs to determine the order in which the SKUs sort. You can use the sort sequence to display SKUs in a different order, such as by size, rather than alphanumerically by SKU code.

SKUs are codes that further define items by virtue of color, size, width, or any other type of user-defined attribute. Usually, you define SKUs when the majority of your items have 2 or more identifying characteristics.

Sold to customers are people placing orders. The system tables the customer's name and address and other basic information so that a customer main record is available for future use.

Soldout control codes define which calculation the system uses to determine when to sell out an item. When a customer orders a soldout item in order entry or order maintenance, the order line is automatically closed with a status of Soldout. The soldout units and dollars are updated in the Item table, Item/Offer table, Source Code table and order history tables. You can define a soldout control code for an item in the S/O control field on the second item screen in item maintenance, or on the SKU screen if the item has SKUs. If you do not define a soldout control code for an item or SKU, it will never sell out automatically in order entry/ maintenance.

Source codes are unique codes used to identify segments of your customer base or a rented list. Each source code is assigned to one offer and one division. Source codes control the freight and pricing method used on an order.

Standard special handling is a set of free-form instructions or notes about how to work on an item, including the charge for the special handling work. Standard special handling is entered on a free-format screen where you can enter any information necessary to explain what needs to be done to the item.

Store pickup order: Use the store pickup integration with Order Orchestration to send orders to an external retail location where the merchandise is already available for pickup.

Unlike a ship-for-pickup order, a store pickup order does not require Order Administration to transfer the inventory to the store. The ship-to address on a store pickup order sent from Order Administration to Order Orchestration is the name and address of the originating store location.

Stored value card refunds allow you to generate a credit card credit against the original stored value card on the order or generate a new stored value card for the amount of the refund to send to the customer when you process a refund.

Sub-offers for an offer allow you to analyze how certain pages in an offer perform from the rest of the offer. For example, you may want to create a sub-offer if the main offer contains insert pages, such as a section of items sold at a discounted price.

Tax Jurisdictions define postal code ranges for an area where a special tax structure exists. For example, tax jurisdictions exist for some counties in New York and New Jersey. Standard tax reporting does not identify taxes collected at the jurisdiction level.

Threshold values indicate the numbers and/or dollar values that trigger the system to generate an email when these values are breached.

Tickler event rules are the criteria that must be met by the system action for the system to create a tickler for a user to resolve.

Tickler events are the system actions for which the system may create a workflow task (tickler).

Tickler procedures are the instructions a user follows to complete the tickler task.

Ticklers are tasks automatically created by the system and assigned to a user when a system action meets the criteria defined for a tickler event rule. For each tickler, you can define the procedures, or instructions, the user should follow to complete the task. A tickler can also be created manually.

User classes are logical groupings of users, for example all Order Entry operators. Like the individual user record, a default menu and default company can be assigned so that all users in this user class will sign on to the same menu and work within the same company. Authority to companies, menu options, secured features and user defined functions can also be assigned at the user class level.

User edit points allow the system to pass a hash map of pre-defined values to an external program for validation whenever a certain activity occurs in the Order Administration application and have the external program return a string response so that Order Administration can display any data returned in the string as an error message on the Order Administration screen from where the user edit point was called.

User exit points allow the system to pass parameters to an external program to obtain additional information whenever a certain activity occurs within Order Administration. You might also set up a user exit point as a means of feeding information to an external accounting package, or a service bureau that maintains customer information.

User records allow an individual to sign on and access all or some of the features of the system. A user can be a customer service representative, an order entry operator, or a system administrator. Each user on the system must have both a user profile and a user control record.

Variable sets are lists of items that customers can choose from to make up the set they want to purchase. Like sets, variable sets are assembled when the set variable is picked and packed. The items which make up the variable set might not appear on the same pick slip, but the picks are created at the same time.

VAT is a taxing method that applies in only certain states in countries. When an order is subject to VAT, the customer is charged a tax-inclusive price, and the tax amount is “hidden” on the order detail line for the item, not included in the Tax bucket for the order.

Vendor response codes identify the reasons that the service bureau approves (authorizes) or declines a credit card charge or deposit. The codes are assigned to each transaction by the service bureau when approving or declining the request.

Vendors are companies who supply you with merchandise or services. A record must be established on the system for every vendor from whom you purchase merchandise.

Virtual stored value cards are virtual (non-physical) cards that you do not stock. Virtual stored value cards are automatically reserved on an order and express-billed during pick slip generation. During pick slip generation, the system also assigns a number to the virtual card. Once the card receives an approved activation from the service bureau, an email is sent to the recipient card holder on the order, notifying the customer that a stored value card has been purchased and providing the stored value card number and dollar amount to use as a form of payment.

Warehouse lists are used to more efficiently allocate an order when you ship from more than one warehouse.

Warehouse management systems control inventory movement, such as receiving merchandise, inventory transactions, picking and packing, and shipping merchandise to a customer.

Warranty items are items you can add to an order at no charge. For example, if a customer previously ordered a grill that came with a 2-year warranty and the burner on the grill was defective, you could add the replacement burner to the customer's order free of charge.

Web service authentication allows you to define a valid web service authentication user or client ID for each web service used by Order Administration.

Workflow management allows you to automate system actions, during which tasks (ticklers) are assigned to a user for action, according to a defined set of procedures, until the issues associated with the ticklers are resolved.

XML inclusion defines which elements to include in a download message.

Zone skipping is a method of reducing freight charges by shipping inventory via one carrier to a central drop point, where it is picked up by another carrier and delivered to its final destination. For example, if you are shipping from a Massachusetts warehouse to destinations in California, you might use one carrier to deliver all packages to a UPS center in California, from which they will be shipped to their California destinations. Whether or not you are using zone skipping determines which table the system uses to identify the drop point.

3 System Control Values

System Control Values

A / B / C / D / E / F / G / H / I / J / K / L / M

A

M

4
Configuration and Administration

Configuration:

- Order Administration Application Configuration
- Regional Settings
- Advanced Queuing
- Properties
- Working with Customer Properties (PROP)
- Working with Admin Properties (CPRP)
- Email Generation Setup
- Image Setup
- Custom Link Setup
- Authorization/Deposit Interface Setup
- Avalara AvaTax Setup
- Vertex Setup
- Order Orchestration Configuration
- Working with Web Service Authentication (WWSA)
- Working with Contact Center (WWCC)

See also Menu Driver Screen.

Administration:

- Logging into Order Administration
- About Application Screen
- Scheduling Jobs
- Document Management (My Docs)
- Job Management (My Jobs)
- Forms Management (My Forms)
- Order Administration Support Notifications
- Restarting Order Administration

Troubleshooting and FAQs

- Reviewing Application Settings in the Jenasys Properties File
- Logs
- Monitoring Jobs
- Caching

- Frequently Asked Questions

Working with Customer Properties (PROP)

Purpose: Use this menu option to define system-wide configuration settings for Order Administration that an administrator type user would update.

When you update a property setting, unless otherwise noted, your update takes effect immediately.

In this topic:

- Work with Properties Screen
- Summary of Customer Properties
- Forms Property Settings
- Integration Property Settings
- System Property Settings

Work with Properties Screen

How to display this screen: Enter PROP in the Fast path field or select Refresh System Properties from a menu.

Authority: Users with ALLOW or DISPLAY authority to this menu option can update the settings in the properties files with the new values.

When you first advance to this screen, property settings display in ascending property name sequence.

Field	Description
Group	The type of property setting. Valid values are: • Forms: The property setting is related to forms processing. • Integration: The property setting is related to an integration with an external system. • System: The property setting is related to a system-wide function. Enter a full or partial group name to display property settings that contain your entry. Alphanumeric, 25 positions; optional.
Property	The name of a property. Enter a full or partial property name to display property settings that contain your entry. You can expand the Property column to review the full name of the property setting. Alphanumeric, 75 positions; optional.

Field	Description
Value	The current setting of the property. If this field is blank, it means a property setting has not been defined. Enter a full or partial property value to display property settings that contain your entry. You can expand the Current Value column if its full value does not display. Alphanumeric, 150 positions; optional.
Type	The type of property setting. This setting is always set to CUSTOMER indicating the property setting is a setting available to the customer. Enter a full or partial property type to display property settings that contain your entry. Alphanumeric, 10 positions; optional.

Screen Option	Procedure
Change the current value defined for a property	Select Change for a property to advance to the Change Property screen.

Summary of Customer Properties

The property settings that display on the Work with Properties Screen are listed below.

- Forms Property Settings
- Integration Property Settings
- System Property Settings

Forms Property Settings

Property Name	Description
BOCARDS	Controls whether certain information prints on the Backorder Card. Currently, there is no information to define.
CAMPAIGNPERF CAMPAIGN_PERFORMANCE	Controls whether certain information prints on the Campaign Performance Report (PCPR). Currently, there is no information to define.
CPGSKUEXUPLOAD CPG_SKU_EXCLUSION_UPLOAD_ERROR	Controls whether certain information prints on the CPG Item/SKU Exclusions Upload Error Records Report. Currently, there is no information to define.
CSHLDORD HELD_ORDER_BY_REASON_REPORT	Controls whether certain information prints on the Held Order by Reason Code Report. Currently, there is no information to define.
CSHLDORDCSV HELD_ORDER_BY_REASON_REPORT_CSV	Controls whether certain information prints on the Held Order by Reason Code Report in spreadsheet format. Currently, there is no information to define

Property Name	Description
EMSTSRPT CUSTOMER_EMAIL_STATUS_REPORT	Controls whether certain information prints on the Unmatched Email Status Report. Currently, there is no information to define.
EXCARSNNOITM EXCHANGE_ALL_REASON_NO_ITEM	Controls whether certain information prints on the Exchange Reason Report when the exchange reason code and item are not defined. Currently, there is no information to define.
EXCARSNNOITMCSV EXCHANGE_ALL_REASON_NO_ITEM_CSV	Controls whether certain information prints on the Exchange Reason Report in spreadsheet format when the exchange reason code and item are not defined. Currently, there is no information to define.
EXCARSNWITM EXCHANGE_ALL_REASON_WITH_ITEM	Controls whether certain information prints on the Exchange Reason Report when an item is defined. Currently, there is no information to define.
EXCARSNWITMCSV EXCHANGE_ALL_REASON_WITH_ITEM_CSV	Controls whether certain information prints on the Exchange Reason Report in spreadsheet format when an item is defined. Currently, there is no information to define.
EXCRSNNOITM EXCHANGE_SPECIFIC_REASON_NO_ITEM	Controls whether certain information prints on the Exchange Reason Report when an exchange reason code is defined. Currently, there is no information to define.
EXCRSNNOITMCSV EXCHANGE_SPECIFIC_REASON_NO_ITEM_CSV	Controls whether certain information prints on the Exchange Reason Report in spreadsheet format when an exchange reason code is defined. Currently, there is no information to define.
EXCRSNWITM EXCHANGE_SPECIFIC_REASON_WITH_ITEM	Controls whether certain information prints on the Exchange Reason Report when an exchange reason code and item are defined. Currently, there is no information to define.
EXCRSNWITMCSV EXCHANGE_SPECIFIC_REASON_WITH_ITEM_CSV	Controls whether certain information prints on the Exchange Reason Report in spreadsheet format when an exchange reason code and item are defined. Currently, there is no information to define.
FLASHPIECHARTS FLASHPIECHARTSFULL	Defines the order statistics that display on the Menu Driver Screen. • FLASHPIECHARTS = The order statistics section of the menu screen displays total numbers and dollars of orders created by the current date, current week, current month, year to date, and previous year. Use this setting if the Delay Billing Updates (K85) system control value is selected. • FLASHPIECHARTSFULL = The order statistics section of the menu screen displays total numbers and dollars of orders created and shipped by the current date, current week, current month, year to date, and previous year. Use this setting if the Delay Billing Updates (K85) system control value is unselected.
FLASHREPORT FLASHREPORT	Controls whether certain information displays in Reviewing Operations Control Summary (FLSH). Currently, there is no information to define.

Property Name	Description
GIFTACKG=GIFTACKDB,SUPPRESS_IMAGES=N,INPUT_TYPE=DB **Note:** These settings also apply to your graphical custom gift acknowledgement. Each option is available only if your gift acknowledgement print program supports it.	Defines whether images print on the graphical Gift Acknowledgement. SUPPRESS_IMAGES Controls whether the system prints images on the graphical gift acknowledgement. • N (default) = Print images on the graphical gift acknowledgement. • Y = Suppress images on the graphical gift acknowledgement. **Note:** The SUPPRESS_IMAGES value should be N for the graphical gift acknowledgement. INPUT_TYPE Controls the means by which your gift acknowledgement printing program obtains the data to print on the gift acknowledgement. Valid values are: • XML = The program uses the *Pick Message from Order Administration (CWPickOut)* to generate the gift acknowledgment. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). • DB = The program queries the database to generate the gift acknowledgement. The INPUT_TYPE setting for the standard printing program GIFTACKG is DB.
JFLR0393 PICKING_PULLSHEET_CARTBIN	Controls whether certain information prints on the Cart/Bin Batch Picking Pullsheet. Currently, there is no information to define.
JFLR0393CSV PICKING_PULLSHEET_CARTBIN_CSV	Controls whether certain information prints on the Cart/Bin Batch Picking Pullsheet in spreadsheet format. Currently, there is no information to define.
JFLR0397 PICKING_PULLSHEET	Controls whether certain information prints on the Cart/Bin Batch Picking Pullsheet. Currently, there is no information to define.
JFLR0397CSV PICKING_PULLSHEET_CSV	Controls whether certain information prints on the Cart/Bin Batch Picking Pullsheet in spreadsheet format. Currently, there is no information to define.
ORDERRECG ORDERREC,SUPPRESS_IMAGES=N **Note:** These settings also apply to your graphical custom order receipt. This option is available only if your order receipt print program supports it.	Defines whether images print on the graphical Order Receipt. SUPPRESS_IMAGES Controls whether the system prints images on the graphical order receipt. • N (default) = Print images on the graphical order receipt. • Y = Suppress images on the graphical order receipt. **Note:** The SUPPRESS_IMAGES value should be N for the graphical order receipt.

Property Name	Description
ORDERSUM ORDERSUM,SUPPRESS_IMAGES=Y	Not currently implemented.
ORDERSUMG ORDERSUM,SUPPRESS_IMAGES=N	Not currently implemented.

Property Name	Description
PICKG =PICKDB,SUPPRESS_IMAGES=N,BARCODE_IMAGE=Code39,ORDER_BARCODE_IMAGE=Code39;INPUT_TYPE=XML **Note:** These settings also apply to your graphical custom pick slip. Each option is available only if your pick slip print program supports it	Defines whether images and barcodes print on the graphical Pick Slip. SUPPRESS_IMAGES Controls whether the system prints images on the graphical pick slip. • N (default) = Print images on the graphical pick slip. • Y = Suppress images on the graphical pick slip. **Note:** The `SUPPRESS_IMAGES` value should be N for the graphical pick slip. BARCODE_IMAGE Controls whether the system prints a barcode on the graphical pick slip. • Code39 (default) = Print this type of barcode on the graphical pick slip. • Code128 = Print this type of barcode on the graphical pick slip. **Note:** **Code 39** is a low-density format that encodes upper case letters (A to Z), digits (0 to 9), and some special characters. **Code 128** is a high-density format that accepts alphanumeric or numeric-only codes, or all 128 ASCII characters. • NOT DISPLAYED = Do not print barcodes on the graphical pick slip. **Note:** This value is case-sensitive. ORDER_BARCODE_IMAGE Controls whether the system prints the order barcode on the graphical pick slip. The barcode is comprised of the company code, order number, and ship to number. • Code39 (default) = Print this type of order barcode on the graphical pick slip. • Code128 = Print this type of order barcode on the graphical pick slip. • **NOT DISPLAYED** = Do not print the order barcode on the graphical pick slip. **Note:** This value is case-sensitive. INPUT_TYPE Controls the means by which your pick slip printing program obtains the data to print on the pick slip. Valid values are: • XML = The program uses the Pick Message from Order Administration (CWPickOut) to generate the pick slip. • DB = The program queries the database to generate the pick slip. The `INPUT_TYPE` setting for the standard printing program PICKG is DB.
PICKAUTH PICK_AUTH_REPORT	Controls whether certain information prints on the Pick Authorization Error Report. Currently, there is no information to define.

Property Name	Description
PICKLBL PICKLBL,SUPPRESS_IMAGES=Y,BARCODE_IMAGE=Code39 **Note:** These settings also apply to your non-graphical custom pick label. Each option is available only if your pick label print program supports it.	SUPPRESS_IMAGES Controls whether the system prints images on the non-graphical pick label. • N = Print images on the non-graphical pick label. • Y (default) = Suppress images on the non-graphical pick label. **Note:** The`SUPPRESS_IMAGES` value should be Y for the non-graphical pick label. `BARCODE_IMAGE` Controls whether the system prints a barcode on the non-graphical pick label. • Code39 (default) = Print this type of barcode on the non-graphical pick label. • Code128 = Print this type of barcode on the non-graphical pick label. **Note:** **Code 39** is a low-density format that encodes upper case letters (A to Z), digits (0 to 9), and some special characters. **Code 128** is a high-density format that accepts alphanumeric or numeric-only codes, or all 128 ASCII characters. • NOT DISPLAYED = Do not print barcodes on the non-graphical pick label. **Note:** This value is case-sensitive.
PICKPACK PICKPACK,SUPPRESS_IMAGES=Y	Not currently implemented.
PICKPACKG PICKPACK,SUPPRESS_IMAGES=N	Not currently implemented.
PICKUNIT PICK_UNIT_REPORT	Controls whether certain information prints on the Pick Unit Report. Currently, there is no information to define.
PPRORDERED PRODUCT_PERFORMANCE_ORDERED	Controls whether certain information prints on the Product Performance Report (Ordered Totals). Currently, there is no information to define.
PPRORDEREDF PRODUCT_PERFORMANCE_ORDERED_FAST	Controls whether certain information prints on the Product Performance Report (Ordered Totals). Currently, there is no information to define.
PPRORDEREDFCSV PRODUCT_PERFORMANCE_ORDERED_FAST_CSV	Controls whether certain information prints on the Product Performance Report (Ordered Totals) in spreadsheet format. Currently, there is no information to define.
PPRORDEREDOT PRODUCT_PERFORMANCE_ORDERED_BY_ORDER_TYPE	Controls whether certain information prints on the Product Performance Report (Ordered Totals). Currently, there is no information to define.
PPRSHIPPED PRODUCT_PERFORMANCE_SHIPPED	Controls whether certain information prints on the Product Performance Report (Ordered Totals). Currently, there is no information to define.
PPRSHIPPEDF PRODUCT_PERFORMANCE_SHIPPED_FAST	Controls whether certain information prints on the *Product Performance Report (Shipped Totals)*. Currently, there is no information to define.

Property Name	Description
PPRSHIPPEDFCSV PRODUCT_PERFORMANCE_SHIPPED_FAST_CSV	Controls whether certain information prints on the *Product Performance Report (Shipped Totals)* in spreadsheet format. Currently, there is no information to define.
PPRSHIPPEDOT PRODUCT_PERFORMANCE_SHIPPED_BY_ORDER_TYPE	Controls whether certain information prints on the *Product Performance Report (Shipped Totals)*. Currently, there is no information to define.
PRCCDUPLDERR PRICE_CODE_UPLOAD_ERROR_REPORT	Controls whether certain information prints on the Price Code Upload Errors Report. Currently, there is no information to define.
PROMOUPLDERR PROMOTION_UPLOAD_ERROR_REPORT	Controls whether certain information prints on the Promotion Upload Error Records Report. Currently, there is no information to define.
PROVRCIRPT PRICE_OVERRIDE_REASON_BY_CODE_AND_ITEM	Controls whether certain information prints on the Price Override Reason Report by reason code and item. Currently, there is no information to define.
PROVRCIRPTCSV PRICE_OVERRIDE_REASON_BY_CODE_AND_ITEM_CSV	Controls whether certain information prints on the Price Override Reason Report by reason code and item in spreadsheet format. Currently, there is no information to define.
PROVRCRPT PRICE_OVERRIDE_REASON_BY_CODE	Controls whether certain information prints on the Price Override Reason Report by reason code. Currently, there is no information to define.
PROVRCRPTCSV PRICE_OVERRIDE_REASON_BY_CODE_CSV	Controls whether certain information prints on the Price Override Reason Report by reason code in spreadsheet format. Currently, there is no information to define.
PROVRIRPT PRICE_OVERRIDE_REASON_BY_ITEM	Controls whether certain information prints on the Price Override Reason Report by item. Currently, there is no information to define.
PROVRIRPTCSV PRICE_OVERRIDE_REASON_BY_ITEM_CSV	Controls whether certain information prints on the Price Override Reason Report by item in spreadsheet format. Currently, there is no information to define.
PROVRRPT PRICE_OVERRIDE_REASON	Controls whether certain information prints on the Price Override Reason Report. Currently, there is no information to define.
PROVRRPTCSV PRICE_OVERRIDE_REASON_CSV	Controls whether certain information prints on the Price Override Reason Report in spreadsheet format. Currently, there is no information to define.
PROVRUCIRPT PRICE_OVERRIDE_REASON_BY_USER_CODE_AND_ITEM	Controls whether certain information prints on the Price Override Reason Report by user code and item. Currently, there is no information to define.
PROVRUCIRPTCSV PRICE_OVERRIDE_REASON_BY_USER_CODE_AND_ITEM_CSV	Controls whether certain information prints on the Price Override Reason Report by user code and item in spreadsheet format. Currently, there is no information to define.

Property Name	Description
PROVRUCRPT PRICE_OVERRIDE_REASON_BY_USER_AND_CODE	Controls whether certain information prints on the Price Override Reason Report by user code and reason code. Currently, there is no information to define.
PROVRUCRPTCSV PRICE_OVERRIDE_REASON_BY_USER_AND_CODE_CSV	Controls whether certain information prints on the Price Override Reason Report by user code and reason code in spreadsheet format. Currently, there is no information to define.
PROVRUIRPT PRICE_OVERRIDE_REASON_BY_USER_AND_ITEM	Controls whether certain information prints on the Price Override Reason Report by user code and item. Currently, there is no information to define.
PROVRUIRPTCSV PRICE_OVERRIDE_REASON_BY_USER_AND_ITEM_CSV	Controls whether certain information prints on the Price Override Reason Report by user code and item in spreadsheet format. Currently, there is no information to define.
PROVRURPT PRICE_OVERRIDE_REASON_BY_USER	Controls whether certain information prints on the Price Override Reason Report by user. Currently, there is no information to define.
PROVRURPTCSV PRICE_OVERRIDE_REASON_BY_USER_CSV	Controls whether certain information prints on the Price Override Reason Report by user in spreadsheet format. Currently, there is no information to define.
PURCHORDG PURCHORD,SUPPRESS_IMAGES=N **Note:** These settings also apply to your graphical custom purchase order. This option is available only if your purchase order print program supports it.	Defines whether images print on the graphical *Purchase Order* SUPPRESS_IMAGES Controls whether the system prints images on the graphical purchase order. • N (default) = Print images on the graphical purchase order. • Y = Suppress images on the graphical purchase order. **Note:** The `SUPPRESS_IMAGES` value should be N for the graphical purchase order.
QUOTE QUOTE,SUPPRESS_IMAGES=Y **Note:** These settings also apply to your non-graphical custom quote form. This option is available only if your quote print program supports it.	Defines whether images print on the non-graphical Quote Form. SUPPRESS_IMAGES Controls whether the system prints images on the non-graphical quote form. • N = Print images on the non-graphical quote form. • Y (default) = Suppress images on the non-graphical quote form. **Note:** The `SUPPRESS_IMAGES` value should be Y for the non-graphical quote form.

Property Name	Description
QUOTEG QUOTE,SUPPRESS_IMAGES=N **Note:** These settings also apply to your graphical custom quote form. This option is available only if your quote print program supports it.	Defines whether images print on the graphical Quote Form. SUPPRESS_IMAGES Controls whether the system prints images on the graphical quote form. • N (default) = Print images on the graphical quote form. • Y = Suppress images on the graphical quote form. **Note:** The `SUPPRESS_IMAGES` value should be N for the graphical quote form.
REFCHECK REFCHECK,SUPPRESS_IMAGES=Y,TEXT_AMOUNT_UPPERCASE=N,INCLUDE_DOLLAR_SIGN=Y **Note:** These settings also apply to your non-graphical custom refund check. This option is available only if your refund check print program supports it.	Defines whether images and a dollar sign print on the non-graphical Refund Check. SUPPRESS_IMAGES Controls whether the system prints images on the non-graphical refund check. • N = Print images on the non-graphical refund check. • Y (default) = Suppress images on the non-graphical refund check. **Note:** The `SUPPRESS_IMAGES` value should be Y for the non-graphical refund check. `TEXT_AMOUNT_UPPERCASE` Defines whether the system prints text on the non-graphical refund check in all uppercase. • N = Print text on the non-graphical refund check in upper and lower case. • Y = Print text on the non-graphical refund check in all uppercase. `INCLUDE_DOLLAR_SIGN` Defines whether the system prints the dollar sign on the non-graphical refund check. • N = Do not print the dollar sign on the non-graphical refund check. • Y = Print the dollar sign on the non-graphical refund check.

Property Name	Description
REFCHECKG REFCHECK,SUPPRESS_IMAGES=N,TEXT_AMOUNT_UPPERCASE=N,INCLUDE_DOLLAR_SIGN=Y **Note:** These settings also apply to your graphical custom refund check. This option is available only if your refund check print program supports it.	Defines whether images and a dollar sign print on the graphical Refund Check. SUPPRESS_IMAGES Controls whether the system prints images on the graphical refund check. • N (default) = Print images on the graphical refund check. • Y = Suppress images on the graphical refund check. **Note:** The `SUPPRESS_IMAGES` value should be N for the graphical refund check. `TEXT_AMOUNT_UPPERCASE` Defines whether the system prints text on the graphical refund check in all uppercase. • N = Print text on the graphical refund check in upper and lower case. • Y = Print text on the graphical refund check in all uppercase. `INCLUDE_DOLLAR_SIGN` Defines whether the system prints the dollar sign on the graphical refund check. • N = Do not print the dollar sign on the graphical refund check. • Y = Print the dollar sign on the graphical refund check.
REPLENDTLSHC REPLENDTLSHC,BARCODE_IMAGE=Code 128	
RESAUDITLOG RESET_AUDIT_LOG	Controls whether certain information prints on the Print Reset Audit Log. Currently, there is no information to define.
RESETBO RESET_AUDIT_LOG_QTY_BACKORDERED	Controls whether certain information prints on the Reset Audit Log for Quantity on Backorder. Currently, there is no information to define.
RESETONHAND RESET_AUDIT_LOG_QTY_ON_HAND	Controls whether certain information prints on the Reset Audit Log for Quantity On Hand. Currently, there is no information to define.
RESETPRT RESET_AUDIT_LOG_QTY_PRINTED_ITEM_LOC	Controls whether certain information prints on the Reset Audit Log for Quantity Printed. Currently, there is no information to define.
RESETRSV RESET_AUDIT_LOG_QTY_RESERVED	Controls whether certain information prints on the Reset Audit Log for Quantity Reserved. Currently, there is no information to define.
RESETSKU RESET_AUDIT_LOG_SKU_QTYS	Controls whether certain information prints on the Reset Audit Log for SKU Quantities. Currently, there is no information to define.
RETARSNNOITM RETURN_ALL_REASON_NO_ITEM	Controls whether certain information prints on the Return Reason Report. Currently, there is no information to define.

Property Name	Description
RETARSNNOITMCSV RETURN_ALL_REASON_NO_ITEM_CSV	Controls whether certain information prints on the Return Reason Report in spreadsheet format. Currently, there is no information to define.
RETARSNWITM RETURN_ALL_REASON_WITH_ITEM	Controls whether certain information prints on the Return Reason Report by item. Currently, there is no information to define.
RETARSNWITMCSV RETURN_ALL_REASON_WITH_ITEM_CSV	Controls whether certain information prints on the Return Reason Report by item in spreadsheet format. Currently, there is no information to define.
RETRSNNOITM RETURN_SPECIFIC_REASON_NO_ITEM	Controls whether certain information prints on the Return Reason Report by reason code. Currently, there is no information to define.
RETRSNNOITMCSV RETURN_SPECIFIC_REASON_NO_ITEM_CSV	Controls whether certain information prints on the Return Reason Report by reason code in spreadsheet format. Currently, there is no information to define.
RETRSNWITM RETURN_SPECIFIC_REASON_WITH_ITEM	Controls whether certain information prints on the Return Reason Report by reason code and item. Currently, there is no information to define.
RETRSNWITMCSV RETURN_SPECIFIC_REASON_WITH_ITEM_CSV	Controls whether certain information prints on the Return Reason Report by reason code and item in spreadsheet format. Currently, there is no information to define.
SLSJRN SALES_JOURNAL	Controls whether certain information prints on the Standard Sales Journal. Currently, there is no information to define.
SLSJRNCSV SALES_JOURNAL_CSV	Controls whether certain information prints on the Standard Sales Journal in spreadsheet format. Currently, there is no information to define.
SLSJRNDIV SALES_JOURNAL_BY_DIV	Controls whether certain information prints on the Sales Journal by Division. Currently, there is no information to define.
SLSJRNDIVCSV SALES_JOURNAL_BY_DIV_CSV	Controls whether certain information prints on the Sales Journal by Division in spreadsheet format. Currently, there is no information to define.
SLSUPERR SALES_REP_UPDATE_ERROR	Controls whether certain information prints on the Sales Rep Update Errors Report. Currently, there is no information to define.
SOLDOUT SOLDOUT	Controls whether certain information prints on the Soldout Notification Card. Currently, there is no information to define.
STRUPERR STORE_UPDATE_ERROR	Controls whether certain information prints on the Store Update Errors Report. Currently, there is no information to define.
TAXJUR TAX_JURISDICTION_REPORT	Controls whether certain information prints on the Tax Jurisdiction Report. Currently, there is no information to define.

Property Name	Description
UTJOBMRPT JOB_MONITOR_STS_TXT	Controls whether certain information prints on the job monitor alert email; see Monitoring Jobs. Currently, there is no information to define.
UTSTSRPT SERENADE_STATUS_REPORT	Controls whether certain information prints on the Order Administration Status report. Currently, there is no information to define.

Integration Property Settings

Property Name	Description
ADDRESS_SERVICE_ENDPOINT_URL	Verify the URL used to connect to EDQ. This setting is delivered with the application and should not be changed.
ADDRESS_SERVICE_RETURN_LAYOUT	The name of the custom layout used for data mapping. This layout resides with Experian and should be set to Serenade. Do not change this setting.
API_SERVER_URL	Information will be provided at a later date.
API_TENANT_ACCESS_KEY	Information will be provided at a later date.
API_TENANT_SECRET_KEY	Information will be provided at a later date.
AVATAX_ACCOUNT	The account ID used for communication with the AvaTax tax interface when a company-specific account ID has not been provided in the AvaTax Account (M37) system control value. See Avalara AvaTax Setup for more information.
AVATAX_LICENSE	The license ID used for communication with the AvaTax tax interface when a company-specific license ID has not been provided in the AvaTax License (M38) system control value. The system encrypts this entry. See Avalara AvaTax Setup for more information.
CA_INVENTORY_FILE_NAME	The file name for the CAINV periodic function to use when creating a file of current inventory levels for items. See Sending Current Inventory Information to ChannelAdvisor for background.

Property Name	Description
CA_PRODUCT_SERVICE_SUFFIX	The suffix to include in the URL used for the ChannelAdvisor price and inventory integration. The CAINV and CAPRICE periodic functions use a web service request to pass the generated price and inventory files to ChannelAdvisor. The URL is composed of the CA_SERVICES_URL_PREFIX concatenated with the CA_PRODUCT_SERVICE_SUFFIX, for example: `https://api.channeladvisor.com/v1/ProductUpload`. Defaults to vi/ProductUpload and should not ordinarily be changed. See Sending Current Inventory Information to ChannelAdvisor and Sending Current Prices to ChannelAdvisor for background.
CA_SERVICES_URL_PREFIX	The prefix to include in the URL used for the ChannelAdvisor price and inventory integration, as described above under the CA_PRODUCT_SERVICE_SUFFIX. Defaults to `https://api.channeladvisor.com` and should not ordinarily be changed. **Note:** It is not necessary for this prefix to include a trailing slash in order to create the full URL of `https://api.channeladvisor.com/v1/ProductUpload`. The CAINV and CAPRICE functions insert the slash. See Sending Current Inventory Information to ChannelAdvisor and Sending Current Prices to ChannelAdvisor for background.
CHANNELADVISOR_ORDER_URL	The URL for: • the CAORDUP periodic function to use when requesting new orders from ChannelAdvisor; see Importing Orders from ChannelAdvisor for background. • Processing Refunds (MREF) to use when sending refund information to ChannelAdvisor; see Submitting Refunds for ChannelAdvisor Orders for background.
CHANNELADVISOR_SHIPPING_URL	The URL for the CASHIP periodic function to use when sending shipment confirmations to ChannelAdvisor; see Sending Shipment Confirmations to ChannelAdvisor for background.

Property Name	Description
CHANNELADVISOR_ PULL_ORDERS_MAX	The maximum number of orders that the GetOrderList function processes at once before sending the notification to ChannelAdvisor that the orders were successfully received and created. Each batch can include up to 50 orders. For example, if you set this property to 100, the function imports two batches of 50 orders. If no maximum is specified, a default of 50 orders applies.
CW_MANIFST_ENVIRONMENT_ID	The environment ID that identifies the Order Administration database environment associated with the Manifest Web Service. The environment ID associated with a database environment is defined in the dbconfig.properties file. You can locate the environment ID in this file by locating the database; the number in the first column for the database represents the environment ID. The default environment ID is 1. Required.
CW_MANIFST_USER_ID	The user ID that the Manifest Web Service uses to connect to the Order Administration database environment specified in the `CW_MANIFEST_ENVIRONMENT_ID` property. **Note:** You must also create this user ID in Order Administration: • as a valid user ID with administrator authority in Work with Users (WUSR), and See User Configuration in the Administration Guide for more information on creating a user ID. Required.
CW_POS_LOG_FILE_NAME	Specifies the name of the POSLog file, with the pound sign (#) indicating where to insert the three-position I53Default Location for ORCE Integration (K69). For example, if you set this property to Store #.POL, the file is named Store #123.POL, where 123 is the Default Location for ORCE Integration (K69).
CWDIRECTCP_ USPS_UPLOAD_ FILE	The folder where the system places files that have been uploaded prior to additional processing. This setting is defined by Oracle and cannot be changed. **Note:** If you are using multiple application servers, you need to update this setting on each server where you plan to use the Load USPS Zip Code File (LZPS) to update postal code data.

Property Name	Description
DELETE_DUPLICATE_INVOICE_OUT_TRIGGERS	Defines whether to delete duplicate invoice trigger records. This new property applies only when the Consolidate Invoice (B49) system control value is selected: • If you consolidate invoices and do not run the INVOICE_OUT job all day, you should set this property to Y to remove duplicate trigger records. • If you consolidate invoices and run the INVOICE_OUT job all day, you should leave this property set to N to prevent sending incomplete invoice data. Otherwise, if you do not consolidate invoices, this property is not used. **Note:** If you change the setting of this property, the new setting is effective immediately.
FILE_STORAGE_MAX_SIZE	The maximum size, in bytes, of a file that can be uploaded to the FILE_STORAGE table. If a file's size exceeds this maximum, the API returns a 403 error and the upload fails. Uploaded files should be less than 1G in size, so this property should be set to 1073741824 or less.
IMAGE_URL_PREFIX	Specifies the prefix to use for the URL of a company logo, entity logo, at the Home page in Modern view, and the menu driver image to display on menu screens or print on forms, including the pick slip, purchase order, quote form, gift acknowledgment, and order receipt. Must point to a publicly available server. For example, set this property to `https://SERVER:7500/images` where `SERVER` is the name of the server, `7500` is the port, and images is the folder where company and entity logo images are stored. The URL for image.png might then be `https://SERVER:7500/images/image.png`. See Setting Up Company Logos for Menu Screens and the Modern View Home Page, Setting Up Menu Driver Images for Companies, and Setting Up Company Logos for Forms for more information. **Note:** This URL is not used for item images. You need to specify the complete URL. See Setting Up Item Images for background.

Property Name	Description
JOB_NOTIFICATION_ENDPOINT_URL	Defines the URL to receive the Job Notification Outbound Message. When you set this URL, the change takes effect immediately. Required to generate the Job Notification message. See *Using the Job Notification Outbound REST Message* for more information. If the endpoint is not valid or cannot be reached for any reason, an error is written to the CWDirect.log. However, if the property is blank, a message such as the following is written to the APP log: DEBUG APP - message: Job Notification Outbound Webservice URL not mentioned in Property. For more information see the Web Services Guide on My Oracle Support (ID 2953017.1)
LOYALTY_REWARDS_ACCOUNT_INQUIRY_PROCESSING	Not implemented.
LOYALTY_REWARDS_REDEEM_CERTIFICATE_PROCESSING	Not implemented.
LOYALTY_REWARDS_VOID_CERTIFICATE_PROCESSING	Not implemented.
MASS_CUSTDWNLD_CUSTOMER_CLASSES	Not currently implemented.
MASS_CUSTDWNLD_FILE_NAME	Not currently implemented.
MASS_CUSTDWNLD_MESSAGE_WRAPPER	Not currently implemented.
oms.car.service.url	The prefix URL for Oracle Retail Collect and Receive Cloud Service (CaR). Provided by your Oracle representative. Defaults to http://hostname:port/.
oms.car.service.version	The message version for the CaR services. A value of ‘2’ is required. Any other value will cause a communication failure.
oms.car.status.enabled	Not currently implemented. Default value of false (blank).
oms.promotion.engine.service.url	The URL entered to store the full URL for the Oracle Retail Promotion Engine (ORPE) Cloud Service with a value of https://[SERVER]/promote/services/dealServices/v2/applyDeals where [SERVER] is replaced with actual server details. **Note:** Only v2 applyDeals is supported.
oms.tax.generic.oauth.client.id	The client ID to use, together with the client secret, to generate the token to use for OAuth 2.0 authentication.

Property Name	Description
oms.tax.generic.oauth.client.secret	The client secret to use, together with the client ID, to generate the token to use for OAuth 2.0 authentication.
oms.tax.generic.oauth.scope	The scope to use when generating the token for authentication.
oms.tax.generic.oauth.url	The URL of the OAuth service to use when generating the token for authentication. Must conform to the OpenId OAuth 2.0 specification to get an authorization token. It also must support the "Client Credentials" Grant Type and accept the client ID and client secret as a Basic Authentication header.
oms.tax.generic.timeout	The number of milliseconds to wait before timing out the tax call. If this property is not set to a number, a default of 30 seconds applies. Optional.
oms.tax.generic.url	*oms.tax.generic.url*: The URL to use when generating the generic tax request. Must: • host a service called /calculateTax. • accept a JSON object conforming to the tax interface request. • return a JSON object conforming to the tax interface response.
oocs.return.locations.service	The prefix URL for the OOCS Eligible Return Location service. Provided by your Oracle representative. Defaults to https://server:port/Locate/rest.
orce.coupon.service.url.suffix	

Property Name	Description
ORCE_ALT_ID_OROMS	Indicates the Alt Key Type of the alternate key in Oracle Retail Customer Engagement that maps to the Order Administration customer number. Defaults to OROMS_ID, but you can override it. If the alternate key record of this type does not already exist in Customer Engagement for a customer, it is created when Customer Engagement receives an add or update customer message. Also, Customer Engagement adds a row to the **CST_ALT_KEY_TYPCODE** table in the Customer Engagement database if it does not already exist. An example of this setting in the Customer Engagement database is: **ORCE_ALT_ID_OROMS=OROMS_ID** An entry here is required to identify the customers for POSlog transactions. This alternate key type is passed in the POSlog transaction message as the TypeCode for the AlternateKey, in order to assign POSlog data with existing customers in Customer Engagement. **Important:** Consult your Oracle representative before you change the setting of this property if you have already enabled the customer integration between Order Administration and Customer Engagement, as previously assigned alternate keys in Customer Engagement will not match up when searching for customers.
ORCE_ALT_ID_WEB	Indicates the Alt Key Type of the alternate key in Oracle Retail Customer Engagement that maps to the e-commerce site's customer number. How to define in Oracle Retail Customer Engagement? You can create a alternate key type such as EONE_USER_ID in Oracle Retail Customer Engagement by: • sending the Customer Engagement Add or Update Customer Message from your e-commerce system with an `AlternateKey` whose `TypeCode is EONE_USER_ID` • adding a row to the **CST_ALT_KEY_TYPCODE** table in the Oracle Retail Customer Engagement database **Note:** See the Customer Engagement Customer Integration for information on how the e-commerce customer ID is used to identify the customer in the order API. An example of this setting is: **ORCE_ALT_ID_WEB=OCP_CUST_ID**

Property Name	Description
ORCE_CARD_SERVICE_SUFFIX	The system uses this property, along with the `ORCE_CUSTOMER_SERVICE_PREFIX` and the value in the ORCE Organization Descriptor (L50) to build the URL for communication with Oracle Retail Customer Engagement using the Oracle Retail Customer Engagement Card Services API. Set this to `/OrceWebServices/v3_2/CardServicesApiService?wsdl` where **3_2** is the version of the Card Services API. The highest supported version is 3_2.
ORCE_CUSTOMER_SERVICE_PREFIX	The system uses this property to build the URL for communication with Oracle Retail Customer Engagement. Set this to **https://server:8447**/ where: • **server** = the name of your Oracle Retail Customer Engagement server • **8447** = the port to use on the Oracle Retail Customer Engagement server
ORCE_CUSTOMER_SERVICE_SUFFIX	The system uses this property, along with the ORCE_CUSTOMER_SERVICE_PREFIX and the value in the ORCE Organization Descriptor (L50) to build the URL for communication with Oracle Retail Customer Engagement using the Customer Services API. Both version 2.3 and version 3.1 are supported. Set this to **/OrceWebServices/v2_3/CustomerServicesApiService?wsdl** where **2_3** is the version of the Customer Services API or /**OrceWebServices/v3_1/CustomerServicesApiService?wsdl** where **3_1** is the version of the Customer Services API. **Note**: This property is not updated automatically, and there is no additional functionality provided by changing the version number to version 3.1.
ORCE_DAY_PHONE_LABEL	Indicates the Telephone Type in Oracle Retail Customer Engagement that maps to the daytime phone number in Order Administration. Should be set to BUSINESS. How to define in Oracle Retail Customer Engagement? You can create a telephone type of BUSINESS in Oracle Retail Customer Engagement by: • sending the Customer Engagement Add or Update Customer Message with a `ContactType` of `Phone` and a `SubTypeCode BUSINESS` • adding a row to the **CST_PHONE_TYPCODE** table in the Oracle Retail Customer Engagement database An example of this setting is: **ORCE_DAY_PHONE_LABEL=BUSINESS**

Property Name	Description
ORCE_EVE_PHONE_LABEL	Indicates the Telephone Type in Oracle Retail Customer Engagement that maps to the evening phone number in Order Administration. Should be set to HOME. How to define in Oracle Retail Customer Engagement? You can create a telephone type of HOME in Oracle Retail Customer Engagement by: • sending the Customer Engagement Add or Update Customer Message with a `ContactType` of `Phone` and a `SubTypeCode HOME` • adding a row to the **CST_PHONE_TYPCODE** table in the Oracle Retail Customer Engagement database An example of this setting is: **ORCE_EVE_PHONE_LABEL=HOME**
ORCE_FAX_PHONE_LABEL	Indicates the Telephone Type in Oracle Retail Customer Engagement that maps to the third phone number in Order Administration. Should be set to MOBILE. The Third Phone Number Type (L53) system control value controls whether the third phone number is labeled as the mobile or fax number in Order Administration. **Note:** The name entered in the Third Phone Number Type (L53) system control value should match the value defined for the `ORCE_FAX_PHONE_LABEL`. How to define in Oracle Retail Customer Engagement? You can create a telephone type of FAX or MOBILE in Oracle Retail Customer Engagement by: • sending the Customer Engagement Add or Update Customer Message with a `ContactType` of `Phone` and a `SubTypeCode FAX or MOBILE` • adding a row to the **CST_PHONE_TYPCODE** table in the Oracle Retail Customer Engagement database An example of this setting is: **ORCE_FAX_PHONE_LABEL=MOBILE**
ORCE_LOYALTY_AWARD_SERVICE_SUFFIX	The system uses this property, along with the ORCE_CUSTOMER_SERVICE_PREFIX and the value in the ORCE Organization Descriptor (L50) to build the URL for communication with Oracle Retail Customer Engagement using the Oracle Retail Customer Engagement Award Account Services API. Set this to /**OrceWebServices/v3_1/AwardAccountServicesApiService?wsdl** where **3_1** is the version of the Award Account Services API. The highest supported version is 3_1.

Property Name	Description
ORCE_LOYALTY_PROMPT_ATTRIBUTE	The text to display on the in Modern View when prompting for loyalty enrollment. Defaults to Does the customer want to join the loyalty program? Up to 55 positions.
ORCE_LOYALTY_REG_MESSAGE	The text to display on the Customer Loyalty Registration Window, up to 55 positions.
ORCE_LOYALTY_SERVICE_SUFFIX	The system uses this property, along with the ORCE_CUSTOMER_SERVICE_PREFIX and the value in the ORCE Organization Descriptor (L50) to build the URL for communication with Oracle Retail Customer Engagement using the Oracle Retail Customer Engagement Loyalty Account Services API. Set this to **/OrceWebServices/v3_4/LoyaltyAccountServicesApiService?wsdl** where **3_4** is the version of the Loyalty Account Services API. The highest supported version is 3_4.
ORCE_REGISTRY_SERVICE_SUFFIX	The system uses this property, along with the ORCE_CUSTOMER_SERVICE_PREFIX and the value in the ORCE Organization Descriptor (L50)ORCE Organization Descriptor (L50) to build the URL for communication with Oracle Retail Customer Engagement using the Oracle Retail Customer Engagement Registry Service API. Set this to **/v3_1/RegistryServices?wsdl** where **3.1** is the version of the Registry Service API. The highest supported version is 3_1.
ORCE_SECURITY_USER_ID	The Oracle Retail Customer Engagement user ID with Security Group permission included in the Oracle Retail Customer Engagement API messages. This setting must be a valid user ID in Oracle Retail Customer Engagement that has Security Group permission.
ORCE_SVC_SERVICE_SUFFIX	The system uses this property, along with the ORCE_CUSTOMER_SERVICE_PREFIX and the value in the ORCE Organization Descriptor (L50) to build the URL for communication with Oracle Retail Customer Engagement using the Oracle Retail Customer Engagement Stored Value Card Transaction Services API. Set this to **/OrceWebServices/v3_1/SvcTransactionServicesApiService?wsdl** where **3_1** is the version of the Stored Value Card Transaction Services API. The highest supported version is 3_1.
ORCE.COUPON.SERVICE.URL.SUFFIX	The system uses this property, along with the ORCE_CUSTOMER_SERVICE_PREFIX, and the value in the ORCE Organization Descriptor (L50) to build the URL for communication with Oracle Retail Promotion Engine for the ORCE Serialized Coupon Service.

Property Name	Description
OROB_DISCOVERY_SERVICES_WSDL_LOCATION	The endpoint for the Discovery Services web service. This entry should be set to `https://SERVER:8443/Locate/DiscoveryServices`, where `SERVER` is the name of your Oracle Retail Order Orchestration server. See Importing Store Cross Reference Locations through Order Orchestration's Discovery Web Service.
OROB_INVENTORY_AVAILABILITY_SKU_LIMIT	The maximum number of items/SKUs flagged as Active PO to include in each inventory availability request to Order Orchestration. The ACTPO periodic function generates this request message as part of future receipts and pre-order processing. The maximum number of records that Order Orchestration will process per request is 500. When this property is blank or is set to a number higher than 500, the request can include up to 500 records if there are that many Active PO items/SKUs evaluated by the periodic function. If there are more than 500 records, the next group of records is included in the next request message. Defaults to 500.
OROB_INVENTORY_AVAILABILITY_URL	The URL to use when submitting the inventory availability request to Order Orchestration through the ACTPO periodic function. Should be set to `https://<SERVER>:<PORT>/Locate/adws/ProductService/1.0/getInventoryAvailability`, where `<SERVER>` is the name of the Order Orchestration server, `<PORT>` is the port, and 1.0 is the version.

Property Name	Description
OROB_LIMITED_STATUS_BEG_TIME OROB_LIMITED_STATUS_END_TIME	Defines settings for the Daily Status Inquiry Time Window (all versions). These settings apply to retail pickup and ship-for-pickup orders. **Overview:** For certain Order Orchestration statuses, it is not necessary to send a status inquiry as frequently as the Order Broker Status Update Interval (K10), because no immediate action is required in Order Administration. These statuses apply to retail pickup and ship-for-pickup orders: • In transit: the order has been shipped to the store location. • received: the order has been received at the store location, but the customer has not yet picked it up. • partially fulfilled: the customer has picked up some of the items, or quantity of items on the order, but has not yet received the entire order. In order to avoid including orders in these statuses in the status list request more often than necessary, if the Use OROB for Ship for Pickup Fulfillment Assignment (M34) system control value is set to NEVER or blank, the BROKER process checks their status once daily during a specified time window. It uses the following two additional properties to determine the start and end of the window: • OROB_LIMITED_STATUS_BEG_TIME=123456 • OROB_LIMITED_STATUS_END_TIME=123456 Each time is indicated in HHMMSS format, military time. For example, if you set these properties to: OROB_LIMITED_STATUS_BEG_TIME=180000 OROB_LIMITED_STATUS_END_TIME=210000 Then the BROKER process can send status inquiry list requests for these orders between 6:00 p.m. and 9:00 p.m. daily. Orders are eligible for status inquiry if an inquiry has not taken place in the previous 12 hours. You should set the time window long enough to process status inquiries for all orders in the related statuses; also, the time window should not cross midnight.

Property Name	Description
OROB_MAXIMUM_STATUS_LIST_REQUEST_ORDERS	Defines the maximum number of request IDs to include in a single Status List request message to Order Orchestration. Defaults to 500, and should not exceed 1000. If you do not set this property to a number of 1 or higher, the maximum number of request IDs to use is set to 1, indicating to send requests for one request ID at a time. You need to stop and restart the BROKER job to apply a change to this property. Pick slip generation also uses this property to determine the maximum number of request IDs to include in a single status list request. **For more information:** See Order Orchestration Configuration.
OROB_MESSAGE_VERSION	Defines the message version to include in Order Orchestration and merchandise locator request messages that Order Administration sends to Order Orchestration. Version requirements: • A message version of 5.0 or higher is required to use the status list request message and streamlined allocation at pick slip generation. See Use OROB Status Inquiry List Web Service (M05) and Use Streamlined Allocation (L63) for background. • A message version of Order Broker 16.0 or higher, or Order Orchestration is required to use the Ship-for-Pickup Orders integration with Order Broker, or Order Orchestration. • A message version of Order Broker 19.0 or higher, or Order Orchestration is required to include the shipment_date tag in the status inquiry response message from Order Orchestration. This date indicates the actual date when the order line was shipped by the fulfilling location, provided the fulfilling system passed this date when it submitted the status update to Order Orchestration when reporting the fulfillment. The shipment date is available to include in shipment notifications to the customer; see *Outbound Email API* for more information. This property cannot be set higher than 19.9 for integration with Order Broker 19.x, or higher than 21.1 for integration with Order Orchestration 22.2.301.0 or higher. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1) **Note:** To avoid unpredictable results, do not leave this property blank.

Property Name	Description
OROB_PURCHASING_SERVICES_MAX_UPDATES	Indicates the maximum number of drop ship updates for Oracle Retail Order Orchestration to include in drop ship status inquiry responses. For example, you might set this number to 100 to prevent a large number of status updates from impeding system performance. If this property is blank, Oracle Retail Order Orchestration does not limit the number of updates included in the response message.
OROB_PURCHASING_SERVICES_MESSAGE_VERSION	Specifies the outbound message version to send to Oracle Retail Order Orchestration for integration with the Supplier Direct Fulfillment module. Should be set to 4.5 or higher.
OROB_PURCHASING_SERVICES_WSDL_LOCATION	The endpoint for the Purchasing Services web service. This entry should be set to `https://SERVER:8443/Locate/PurchasingServices`, where `SERVER` is the name of your Oracle Retail Order Orchestration server.
OROB_SERVICES_WSDL_LOCATION	The endpoint for the Services web service. This entry should be set to `https://SERVER:8443/Locate/LocateServices`, where `SERVER` is the name of your Oracle Retail Order Orchestration server.
PMD_PAY_LINK_SERVICE	The name of the external system. **Note:** This field is not currently implemented.
PMD_PAY_LINK_SERVICE_BATCH_DEPOSIT_PORT	The port number used to connect to Paymentech to process batch deposit transactions. **Note:** Defining a separate port number to process batch deposit transactions allows you to run pick slip generation (batch authorizations) and deposits at the same time. Leave this setting blank if you wish to use the port number defined for the PMD_PAY_LINK_SERVICE_BATCH_PORT property to process both batch authorization and deposit transactions; if you use the same port number to process batch authorization and deposit transactions, you cannot run pick slip generation and deposits at the same time. **Note:** This setting is not currently implemented.
PMD_PAY_LINK_SERVICE_BATCH_IP_ADDRESS	The IP address used to connect to Paymentech to process batch transactions. **Note:** This setting is not currently implemented.
PMD_PAY_LINK_SERVICE_BATCH_PORT	The port number used to connect to Paymentech to process batch transactions. **Note:** This setting is not currently implemented.
PMD_PAY_LINK_SERVICE_ONLINE_IP_ADDRESS	The IP address used to connect to Paymentech to process online transactions. **Note:** This setting is not currently implemented.

Property Name	Description
PMD_PAY_LINK_SERVICE_ONLINE_PORT	The port number used to connect to Paymentech to process online transactions. **Note:** This setting is not currently implemented.
QAS ADDRESS SERVICE TOKEN	Enter the address service token used by EDQ to identify a customer; this is a token you created in the EDQ self service portal.
UPDATE_ON_ORDER_FROM_PO_LAYERING	Select this property to have the warehouse on-order quantity updated through the purchase order layering process. Default = false. • You should set this property to TRUE if you upgrade to 19.0 or higher from a release prior to 18.0, in order to have PO layering update the on-order quantity consistently with prior functionality. • You should leave this property set to FALSE if you use the enterprise order integration for future receipts and pre-order processing. See Purchase Order Layering for background on the purchase order layering process.
VERTEX_PASSWORD, VERTEX_USER	The user ID and password used to connect to Vertex. The password is encrypted. See Vertex Setup.
VERTEX_SERVICE_ENDPOINT_URL	The URL used to communicate with Vertex, such as http://example.com/vertex-ws/services/CalculateTax90, where 90 indicates the version of Vertex, such as 9.0. See Vertex Setup.
XLINK_POSLOG_FILE_DATETIME XLINK_POSLOG_FILE_EXTENSION XLINK_POSLOG_FILE_FORMAT XLINK_POSLOG_FILE_PREFIX XLINK_POSLOG_FILE_TRIGGER_EXTENSION	Used to create the name of a custom POSLog: • the date and time format. • the file extension. • the file format. • the file prefix. • the file trigger extension.

System Property Settings

The settings below define configuration settings for the Order Administration application server.

Property Name	Description
DECIMAL_SEPARATOR	The character format used to indicate the decimal place in a number on screens. Valid value are: . (period); default , (comma) For example, if you enter . (period) as the decimal separator, a number with decimals displays as 123.45. If you enter , (comma) as the decimal separator, a number with decimals displays as 123,45. During installation, the system prompts for the default decimal separator of Order Administration. The system stores the default decimal separator in this property. **Important:** If you change the default decimal separator from the decimal separator selected during installation, the new default decimal separator applies only to new data; seed data provided during installation will not be translated to the new decimal separator format. The decimal separator used on reports generated through Oracle Analytics Cloud is based on the BI Date and Separator Format defined for the company. See Regional Settings for an overview, and see Where are Number Format Applied? for more information on the decimal separator that defaults to different areas of the application.

<table>
<tr><th>Property Name</th><th>Description</th></tr>
<tr><td>DEFAULT_DATE_FORMAT</td><td>The default date format used in the application.
Valid values are:
MY (DDMMYY) = If the date is December 25 2018, the date displays as 251218.
MDY (MMDDYY) = If the date is December 25 2018, the date displays as 122518.
YMD (YYMMDD) = If the date is December 25 2018, the date displays as 161228.
During installation, the system prompts for the default date format of Order Administration. The system:
Stores the default date format in this property. Important: If you change the default date format from the date format selected during installation, the new default date format applies only to new users and companies; seed data provided during installation will not be translated to the new default date format.
Defaults this date format to the admin user that is created during installation.
Defaults this date format to the Date format field in the Company table for the companies delivered with Order Administration. However, you can change the date format for a company in the Work with Company (WCMP) menu option.
When you create a new user or company, the system assigns the default date format to the user or company. However, you can change the date format defined for a user in the Work with Users (WUSR) menu option and you can change the date format for a company in the Work with Company (WCMP) menu option.
Note: Regardless of the date format that displays on screens, dates are stored in the database in CYYMMDD format.
The date format to use on reports generated through Oracle Analytics Cloud is based on the BI Date and Separator Format defined for the company.
Note: In order to have a consistent date format on all reports, this property and the Date Format defined for the company should be the same.
See Regional Settings for an overview and see Where are Number Format Applied? for more information on the date format used for different areas of the application.</td></tr>
</table>

Property Name	Description
DEFAULT_LOCALE	The default locale used in the application, indicating the default language for the application. During installation, the system: • Stores the default locale in this property. • Defaults this locale to the admin user that is created during installation. • Defaults this locale to the Locale field in the Company table for the companies delivered with Order Administration. • When you create a new user or company, this default locale defaults, but you can override it. See: • Regional Settings for an overview. • Where are Date Formats Applied? for more information on which date format the system uses in different areas of the application. • Where are Number Format Applied? for more information on the decimal and thousand separators the system uses in different areas of the application.
ECOMMERCE_AVAILABILITY_XML_VERSION	The XML version of the Availability Web XML message received from an external system; see *E-Commerce Availability Web API*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1)
ECOMMERCE_PRODUCT_XML_VERSION	The XML version of the ProductWeb XML message generated through Downloading E-Commerce Offer Files (EOFR) when the Generate E-Commerce Offer Tables (M29) system control value is unselected.
oms.ui.session.timeout	The number of minutes before an inactive user session times out in either Classic View or Modern View. Your entry can be a whole number from 15 to 1440. Defaults to 30 minutes, and an inactivity timeout interval of 30 minutes applies if this property is blank.

Property Name	Description
THOUSAND_SEPARATOR	The character format used to separate groups of thousands. Valid value are: , (comma); default . (period) For example, if you enter . (decimal) as the thousand separator, a number with thousand displays as 1.000. If you enter , (comma) as the thousand separator, a number with thousand displays as 1,000. During installation, the system prompts for the default thousand separator of Order Administration. The system stores the default thousand separator in this property. **Important:** If you change the default thousand separator from the thousand separator selected during installation, the new default thousand separator applies only to new data; seed data provided during installation will not be translated to the new thousand separator format. The thousand separator used on reports generated through Oracle Analytics Cloud is based on the BI Date and Separator Format defined for the company. See Regional Settings for an overview and see Where are Number Format Applied? for more information on the thousand separator that defaults to different areas of the application.

Working with Admin Properties (CPRP)

Purpose: Use this menu option to define system-wide configuration settings for Order Administration that an administrator would update.

When you update a property setting, your update takes effect immediately.

In this topic:

- Work with Admin Properties Screen
- Change Property Screen
- Summary of Admin Properties
  - Email Property Settings
  - Forms Property Settings
  - Integration Property Settings
  - Logging Property Settings
  - Monitor Property Settings
  - System Property Settings

Work with Admin Properties Screen

Use this screen to define property settings that are available to an administrator user in the application.

How to display this screen: Enter CPRP in the Fast path field or select Work with Admin Properties from a menu.

When you first advance to this screen, property settings display on this screen in ascending property name sequence.

Column sort: You can sort on any column on this screen by clicking the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Field	Description
Group	The type of property setting. Valid values are: • Email: The property setting is related to email processing. • Logging: The property setting is related to logging. • Integration: The property setting is related to an integration with an external system. • Monitor: The property setting is related to job monitoring. • Printing: The property setting is related to printing. • System: The property setting is related to a system-wide function. Enter a full or partial group name to display property settings that contain your entry. Alphanumeric, 25 positions; optional.
Property	The name of the property. Enter a full or partial property name to display property settings that contain your entry. Alphanumeric, 75 positions; optional.
Value	The current setting of the property. If this field is blank, it means a property setting has not been defined. Enter a full or partial property value to display property settings that contain your entry. Alphanumeric, 150 positions; optional.
Type	The type of property setting. Valid values are: • Admin = The property setting is a setting available to an administrator user in the application. • Customer = The property setting is a setting available to a user in the application. Enter a full or partial property type to display property settings that contain your entry. Alphanumeric, 10 positions; optional.

Screen Option	Procedure
Change the current value defined for a property	Select Change for a property to advance to the Change Property screen.
Switch between viewing admin property settings and customer property settings	Select Admin/Customer. • If you are currently on the Work with Admin Properties screen, the system advances you to the Work with Properties Screen. • If you are currently on the Work with Properties screen, the system advances you to the Work with Admin Properties Screen.

Change Property Screen

Purpose: Use this screen to change a property setting.

How to display this screen: Select Change for a property on the Work with Admin Properties Screen.

Field	Description
Property	The name of the property whose value you wish to update. Alphanumeric, 75 positions; display-only.
Group	The group assigned to the property. Alphanumeric, 25 positions; display-only.
Type	The type of property setting. Valid values are: • Admin = The property setting is a setting available to the administrator user. • Customer = The property setting is a setting available to customer. Alphanumeric, 10 positions; display-only.
Display	Defines whether you can update the property setting. Valid values are: • C = You can change the value defined for the property. • D = The value defined for the property is display-only. Alphanumeric, 1 position; display-only.
Value	The current setting of the property. If this field is blank, it means a property setting has not been defined. **Note:** The system does not validate your entry. Alphanumeric, 150 positions; optional.

Summary of Admin Properties

The property settings that display on the Work with Admin Properties Screen are listed below.

- Email Property Settings
- Forms Property Settings
- Integration Property Settings
- Logging Property Settings
- Monitor Property Settings
- System Property Settings

Email Property Settings

See Email Generation Setup for more information on the required and optional setup for generating email notifications through Order Administration.

Property Name	Description
CWEMAIL_TEMPLATE_PATH	The location of the folder containing the template files used to generate HTML-based emails. Not used for shipment emails generated through the Narvar integration.
oms.email.job.queue.output.name	The output queue to use for emails. Output queues are displayed when you select the My Jobs option in Order Administration, where you can use them for filtering purposes. The default output queue is EMAIL. Not used for shipment emails generated through the Narvar integration.
oms.email.support.to	The list of email addresses to receive the Support Notification email when a job is placed in MSG status because an error has occurred, or System Alert email for other errors such as inconsistent system control value setup across companies. Separate each email address with a semi-colon (;), such as: email1@add.com;email2@add.com. **Note:** You cannot enter an email distribution list in this field. However, you can use an email program, such as Microsoft Outlook®, to create rules to send emails to a distribution list. See Order Administration Support Notification for more information on error email processing.

Forms Property Settings

Property Name	Description
BI_BYPASS_CACHE_ENABLE	Defines whether the system bypasses caching for reports generated using Oracle Business Intelligence Publisher. true = Bypass caching for reports generated using Oracle Business Intelligence Publisher. false = Cache reports generated using Oracle Business Intelligence Publisher.
BI_REST_REPORTS_FOLDER	The location in Oracle Analytics Cloud where Order Administration reports are stored. Needs to be set to OMSCS/Reports/.
BI_REST_URL	The name of the host where Oracle Business Intelligence Publisher is running. The system uses this property to build the URL for communication with Oracle Business Intelligence Publisher. For example: https://<host>:<port>/xmlpserver/services/rest/reports where: • host is the setting in the BI_REST_URL. • port is the setting in the BI_REST_PORT. • xmlpserver/service/rest/reports is the setting in the BI_REST_SERVER_PATH.

Property Name	Description
BI_REST_PORT	The IP port number where Oracle Business Intelligence Publisher is running. The system uses this property to build the URL for communication with Oracle Business Intelligence Publisher. For example: https://<host>:<port>/xmlpserver/services/rest/reports where: • host is the setting in the BI_REST_URL. • port is the setting in the BI_REST_PORT. • xmlpserver/service/rest/reports is the setting in the BI_REST_SERVER_PATH.
BI_REST_SERVER_PATH	The fixed prefix for Oracle Business Intelligence Publisher REST report resource. The system uses this property to build the URL for communication with Oracle Business Intelligence Publisher. For example: https://<host>:<port>/xmlpserver/services/rest/v1/reports where: • host is the setting in the BI_REST_URL. • port is the setting in the BI_REST_PORT. • xmlpserver/service/rest/v1/reports is the setting in the BI_REST_SERVER_PATH.
BI_REST_USER	The user ID used to connect to Oracle Business Intelligence Publisher.
BI_REST_PASSWORD	The password for the user ID used to connect to Oracle Business Intelligence Publisher. For security, the system encrypts the password.

Integration Property Settings

See *Integrations* for more information on the set up required for integrations with Order Administration.

Property Name	Description
ASSOCIATE_FILE_PATH	The directory the Salesman Associate Upload Process monitors for new Salesman Associate files to place files that have been uploaded prior to additional processing. This setting is defined by Oracle and cannot be changed. **Note:** The name of the file must start with SR and have a .TXT file extension; for example: SR00001.txt and SR00002.txt. If there are multiple eligible files, they are processed sequentially based on file name; SR00001 processes before SR00002. You can use the file storage API to upload a zip file that contains a single text file with the same name, for example: SR00001.ZIP containing a text file named SR00001.TXT.
CA_INVENTORY_FILE_LOCAL_FOLDER	The folder on the Order Administration server where the CAINV periodic function writes the inventory file. See Sending Current Inventory Information to ChannelAdvisor for background. This property is set by Oracle and cannot be changed.
CWDIRECTCP_UPLOAD_ BATCH_SIZE	Defines the number of records to process in an upload file at a time. The default setting is 2500, indicating the system inserts records from the upload file into the Order Administration database in batches of 2500. If a record in a batch contains an error, the system does not insert any of the records in the batch into the Order Administration database and places the upload file in an error status. For troubleshooting purposes, you can decrease the UPLOAD_BATCH_SIZE and reprocess the file upload to help you determine which record contains the error. Example: In this example, the CWDIRECTCP_UPLOAD_BATCH_SIZE is 10. You process an upload file containing 30 records. In this situation, the system processes the upload file in 3 batches: the first batch contains records 1-10; the second batch contains records 11-20; and the third batch contains records 21-30. If a record in the second batch fails, the system does not process any of the records in the second batch, but does process all of the records in the first batch and third batch. See Work with File Uploads (WUPL) for more information.

Property Name	Description
	Setting for pick slip forms generated through the database: If you use a pick slip form that is generated directly through the database, set this value to 999999. The INPUT_TYPE setting for your pick slip form in the Forms Properties indicates the means by which your pick slip printing program obtains the data to print on the pick slip. Valid values are: • XML (default) = The program uses the *Pick Message from Order Administration (CWPickOut)* to generate the pick slip. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). • DB = The program queries the database to generate the pick slip. This option is available only if your pick slip printing program supports it. **Note:** If no INPUT_TYPE is specified, the program uses the CWPickOut message.
ELO_CONFIG_URL	Defines the URL to use to establish a connection with Oracle Retail EFTConnect when you open the Payment Configurations page in Modern View. Contact your Oracle representative if this property is not defined, or if the Payment Configurations page in Modern View displays an error.
ELO_IDCS_ENDPOINT_URL	Defines the URL to use when requesting the token for OAuth authentication for the integration with EFTConnect. Setup of the EFTConnect outbound web service authentication is required in Work with Web Service Authentication (WWSA). Contact your Oracle representative if this property is not defined.
ELO_PAYMENT_URL	Defines the URL to use for any transactional communication with EFTConnect, such as obtaining a form token, authorization, or deposit. Required for use of the Payment Configurations page in Modern View. Contact your Oracle representative if this property is not defined.
ELO_POLL_COUNT_THRESHOLD	Indicates how many times a Capture, Refund, or Auth+Capture call to EFTConnect can be made to check to see if it has the status of the transaction from the payment provider before its status changes to Unconfirmed. The current poll count is tracked on the Credit Card Deposit record. If the poll count is equal to or greater than the setting of this property, the Credit Card Deposit record is deleted and the deposit is unconfirmed. You can then use Resubmit Rejected Deposits in Modern View to attempt to resubmit the deposit. Defaults to 3. Must be at least 1 and cannot be higher than 99. A change to this setting takes effect immediately.
ELO_THRESHOLD_TIME	Used for logging purposes. Compares the elapsed time of the web service with the this setting. If the elapsed time exceeds the threshold, a message is logged.

Property Name	Description
ELO_TIMEOUT	Defines the number of milliseconds to wait before requests from Order Administration to EFTConnect time out. Defaults to 12000 milliseconds (12 seconds). Depending on the type of request and the payment provider, the record might stay in SENT status or RDY status; or, in the case of a new payment method, the payment information might not be saved and an error displayed.
IDCS_ENABLED	Defines whether the IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management) integration is enabled. false = The system uses internal password authentication. true (default) = The system uses IDCS or OCI IAM for password authentication. Note: • Once you change this property to true, the setting can no longer be changed. If you need to change this setting back to false, you must contact your support representative to disable IDCS or OCI IAM. • New cloud installations of Order Management System version 17.1 and later, or Order Administration, will have this setting delivered as true. • When you enable the IDCS or OCI IAM integration, the system no longer creates records in the Password Audit table to track when a user's password is updated. • Before you change this value to true, make sure your admin user and other users in Order Administration are set up in IDCS or OCI IAM and match the exact format of the user name. • When this property is set to true, multi-factor authentication is disabled. See Multi-Factor Authentication in the Administration Guide for background. • When defining a user ID in IDCS or OCI IAM, the user ID is NOT case-sensitive. • If this property is set to true, when users sign out of Order Administration or OACS Modern View, they return to the IDCS or OCI IAM login page. • When this property is set to true, working with User Control records is not available through the Advanced Commands option. See Oracle Authentication (IDCS or OCI IAM) in the Administration Guide for more information.
IDCS_ACCESS_ APPLICATION_ID	Not currently implemented.

Property Name	Description
INVOIC_OUT_MAX_THREADS	Controls the maximum number of threads that the INVOIC_OUT job spawns to process invoice trigger records. Defaults to 10. Optionally, set it to a higher number to enhance performance. If this property is not set to a whole number larger than 0, a setting of 1 applies. See the Generic Invoice Download API for more information on the INVOIC_OUT process in the Web Services Guide on My Oracle Support (ID 2953017.1)
OCDS_RESPONSE_BATCH_SIZE	The number of records to request at a time for different types of data imported through the integration with Omnichannel Cloud Data Service (OCDS). Background: The OCDSITM periodic function requests merchandise hierarchy information, item information, item image information, item location attribute information, and pricing information, if the related system control value for each type of data is configured. Limiting the number of records in the response: For each of these types of data (with the exception of merchandise hierarchy information), the function requests the number of records specified in this property; for example, it requests up to 15,000 pricing information records when this property is set to 15,000. Oracle recommends that you set this property no higher than 100,000. The default setting is 10,000. If property not set: if this property is blank, the import requests the number of records defined in the INT_OCDS_CONFIG table for the import type. For example, if this property is blank and the quantity defined in the table for the item image import is 10,000, then the item image request specifies a quantity of 10,000. INT_OCDS_CONFIG defaults: The default settings in this table are 10,000 for each type of imported information. **Note:** This setting does not control the number of records requested for the merchandise hierarchy import; instead, it always uses the setting from the INT_OCDS_CONFIG table. For more information: See Importing Enterprise Foundation Data through Omnichannel Cloud Data Service (OCDS).
oms.car.scope	The scope used for Oracle Retail Collect and Receive Cloud Service (CaR). Provided by your Oracle representative. Defaults to domain:scope.
oms.cloud.file.transfer.bucket	This auto populated property displays the bucket value for file transfers that is specific to each environment.
oms.cloud.file.transfer.timeout	The timeout for the file transfer service. Default 15000.
oms.cloud.file.transfer.url	This auto populated property holds the file transfer service (FTS) base URL value.
oms.cloud.file.transfer.version	The version of the file transfer service (FTS) such as /fts/v1.

Property Name	Description
oms.promotion.engine.token.url	Defines the URL to use when requesting the token for OAuth authentication for the integration with ORPE. Setup of the ORPE outbound web service authentication is required in Work with Web Service Authentication (WWSA). Contact your Oracle representative if this property is not defined.
ORCE_CUSTOMER_ID_DIRECTORY_PATH	Defines the location on the Order Administration application server where the Update Customer with Relate ID periodic function (program name PFRCIU) looks for the Oracle Retail Customer Engagement query results comma separated value file (CSV) to process. See Customer Engagement Update Customer with Relate ID Process. This setting must be a valid location on the Order Administration application server. An example directory setting is `/domain/conf/OACSFiles/RelateData/customerID/`, where `domain` is the installed location of Order Administration.
ORCE_DIRECTORY_PATH	Defines the location where Order Administration places the batch files to send to Oracle Retail Customer Engagement. **Note:** • This setting is defined by Oracle and cannot be changed. • Not related to the Customer Engagement Customer Integration. • Because Order Administration uses this directory to stage files before executing a transfer through the file transfer service, this setting still needs to specify a valid path if you use Customer Engagement File Transfer Service (FTS).
QAS SERVICES WSDL LOCATION	The location of the ProOnDemandService.wsdl file. The recommended location is file:///domain/conf/cwdirectcpproperties/ProOnDemandService.wsdl, where domain is the WebLogic domain directory for Order Administration. The ProOnDemandService.wsdl is delivered with Order Administration and should not be changed.
STORE_FILE_PATH	The directory the Store Upload Process monitors for new Store files to process. **Note:** The name of the file must start with ST and have a .TXT file extension; for example: ST00001.txt and ST00002.txt. See Store Upload. This property is set by Oracle and cannot be changed. **Note:** You need to use Work with File Uploads (WUPL) to upload stores.
XLINK_DIRECTORY_PATH	The directory where the POSLOGX periodic function places a custom POSlog to send to Xlink when you are not using the file storage API. This property is set by Oracle and cannot be changed.

Logging Property Settings

See Logs for more information on the logs that are available to help troubleshoot Order Administration processing.

Property Name	Description
CUST_FILE_NAME	The name of the log that stores Customer API transaction information. The delivered setting is CUST.log. If you Use Multiple Application Servers If you use multiple application servers, rename the log so that it identifies the server where the log is located. For example, if you use two application servers named SERVER1 and SERVER2, rename the CUST log on each server to CUSTSERVER1.log and CUSTSERVER2.log.
OCDS_JOB_HISTORY_RETENTION_DAYS	Defines the number of days to retain records in the INT_OCDS_STATUS table. This table tracks activity of the and the OCDSFA periodic function (see Importing Future Available Information (OCDSFA Periodic Function) for background). You can review these records at the **Enterprise Data Import History** page in Modern View. The OCDSITM periodic function purges records older than the number of days specified here. Default = 30 days. If this property is blank, the periodic function does not purge records.
oms.promotion.engine.service.timeout	Defines the number of seconds to wait before requests from Order Administration to the ORPE Promotion / dealServices/applyDeals method time out. Defaults to 500 seconds.
oms.db.query.log.threshold	Oracle staff can use this property to control when to log longer-running queries for troubleshooting purposes. Queries that run for longer than the number of milliseconds defined here create log entries that include terms such as `Query Timer` and `took longer than logging threshold`. Defaults to 4000 milliseconds.

Monitor Property Settings

The settings below are used by Oracle staff to manage system processing.

For more information: See:

- Monitoring Jobs for more information on how the system monitor jobs to ensure that they are running correctly.
- Long Running Jobs Monitor for more information on how the system watches the batch jobs running on the Job Management Screen and sends a Long Running Job Email to a specified email address if a job runs without ending longer than a specified time.
- Working with Required Responses (WREQ) and Required Response Processing for more information on how to respond to Order Administration jobs that require user intervention in order to proceed.

- Running a Periodic Process on Server Startup for more information on how to run a periodic process when the Order Administration application server is restarted.

Property Name	Description
oms.reports.service.active.procedures	Used to filter data on the Managed Services report.
oms.reports.service.email.to	The email addresses that receive Managed Services reports. Separate email addresses with a semi-colon.
ALLOW_JOB_MONITOR	Indicates whether the job monitor runs on this application server. Valid values: Y = The job monitor runs on this server. N (default) or blank = The job monitor does not run on this server. In this situation, the only option on the Work with Job Monitor Rules Screen is to display a rule's settings. **Note:** Set this value to Y for all application servers that you wish to collect data on the Work with Job Monitor Screen (WJMO).
oms.reports.service.processes	Used to filter data on the Managed Services report.
oms.job.history.purge.retain.days	Defines how long to retain a batch job in the Job History table before the system purges it automatically based on the job's End date. The default setting is 30 days. The system submits the Job History purge process each time you start the application server. Job History records that do not have an End Date (indicating the job did not end) are not purged. **Note:** This setting does not apply to the history records in the job_run_history table. These records are not currently purged. The job_run_history table contains records for the BILLUPD and SCHDDEP periodic functions. See Display Job History (DJHY) for more information.
JOB_MONITOR_QUERY_ DIRECTORY	The directory on the application server where you store queries used by the job monitor. An example directory is domain/conf/OACSFiles/JobMonitorQueries/, where domain is the installed location of Order Administration.
REPORT_TYPE	Indicates the format of the Managed Services report. • pdf = Generate the Managed Services report in .pdf portable document format. • rtf = Generate the Managed Services report in .rtf rich text format. • txt = Generate the Managed Services report in .txt text format.
RESPONSE_EMAILS	The list of email addresses that receive the Response Required Email when a job requires user intervention. Each email address entered must be separated by a semi-colon (;). For example: email1@add.com;email2@add.com.

Property Name	Description
RESPONSE_RETRIES	The number of times Order Administration looks for a response to a job that requires user intervention before using the default response in order to proceed with the job. For example, if this setting is 5, Order Administration will look for a user response five times, waiting 60 seconds between each timeSee Working with Required Responses (WREQ).
oms.reports.service.email.subject	The text that displays in a Managed Services email.
oms.reports.service.email.disabled	Defines whether a Managed Services email is generated. • Y = Do no generate Managed Services emails. • N = Generate Managed Services emails.
TRACK_ALERTS_IN_LOG	Indicates whether you log all alerts generated by the job monitor. Valid values: • Y = Log all alerts generated by the job monitor in the Alert Log. • N or blank = Do not log alerts generated by the job monitor.

System Property Settings

The settings below define configuration settings for the Order Administration application server.

Property Name	Description
CC_TOKENIZATION_DEFAULT_LOG_LEVEL	Information will be provided at a later date.
CC_TOKENIZATION_LOG_NAME	Information will be provided at a later date.

Property Name	Description
CHECK_AUTHS_IN_PICKS	Defines whether you can process Streamlined Pick Slip Generation (WSPS) when records exist for your company in the CC Authorization Transaction table. Valid values are: • Y or this setting does not exist = Before processing Streamlined Pick Slip Generation (WSPS), the system first looks for records in the CC Authorization Transaction table for the company for which you are generating pick slips. If records exist in the CC Authorization Transaction table, the system does not continue with pick slip generation and instead generates a Pick Authorization Error Report and a Order Administration Support Notification. Review the records in the CC Authorization Transaction table to determine if you need to use the Reprocess Authorizations Screen (RPAA) to reprocess authorizations and clear the records from the CC Authorization Transaction table. • N = The system allows you to run Streamlined Pick Slip Generation (WSPS) when records exist for your company in the CC Authorization Transaction table. Any records in the CC Authorization Transaction table will be resent for authorization. See Pick Slip Generation Overview.
COMMIT_RATE	The number of records that the Batch Inventory Overlay Upload should process at a time. Normally set to 1000.
CWDIRECTCP_FTP_FOLDER	The location of the FTP script for the POSLog integration (poslog_ftp_commands.script file). This property is set by Oracle and cannot be changed. This folder is also used for the following integrations: • Integration with the Sales Audit Module of the Oracle Retail Merchandising Foundation Cloud Service • Working with the Marketing Download Extract See these integrations for more information.
The CWDIRECTCP_LINK_TEXT and CWDIRECTCP_LINK_URL settings below allow you to add a link to all screens in Order Administration (with the exception of the menu screens, the DITH and MMCM menu options, and the administrative screens such as Job Management and Document Management).	Example: If you enter Go To Google in the CWDIRECTCP_LINK_TEXT setting and http://www.google.com in the CWDIRECTCP_LINK_URL setting, then each screen will have a link that reads Go To Google that will open a new browser window and launch the URL to the Google web site.

Property Name	Description
CWDIRECTCP_LINK_TEXT	Defines the text to display on the Order Administration screens for the link. Example: If you enter Go To CNN, then each screen will have a link that reads Go To CNN. If you are Using Multiple Application Servers If you are using multiple application servers, you will need to update this setting on each server.
CWDIRECTCP_LINK_URL	Defines the URL to launch when a user clicks the link on a Order Administration screen. Example: If you enter http://www.cnn.com, the system opens a new browser window and launches the URL to advance to the CNN web site. If you are Using Multiple Application Servers If you are using multiple application servers, you will need to update this setting on each server.
Password Rules	The following settings identify the requirements for user passwords, including the minimum and maximum length and any required numeric, uppercase, or special characters. **Note:** These settings are not currently used. **When you change password rules:** Your new password rules take effect for new users the next time you reboot Order Administration or the server itself. However, your password rules do not prevent existing users from logging in using passwords created under the previous rules. The new rules apply only when you attempt to change user control record settings or change the password itself. To make sure a user will change the password to conform to the new rules upon the next login, set the user's Password Expired field to a date that is earlier than the current date. See User Configuration in the Administration Guide for more information.
CWDIRECTCP_UPLOAD_DIRECTORY	The location where an import process initially uploads files. This property is set by Oracle and cannot be changed. See Work with File Uploads (WUPL) for more information.
CWDIRECTCP_USPS_UPLOAD_FILE	The temporary location on the Order Administration application server where the system should look for the City State data file when you use the Load USPS Zip Code File (LZPS) to update postal code data. This property is set by Oracle and cannot be changed. **Note:** If you are using multiple application servers, you need to update this setting on each server where you plan to use the Load USPS Zip Code File (LZPS) to update postal code data.

Property Name	Description
CWMQ_TARGET_CLIENT	The default setting is 1.
CWMQ_WAIT_TIME	The default setting is -1.
DEPOSIT_MAX_THREADS	Controls the number of threads available to process deposits. The default setting is 1. Optionally, set it to a higher number to enhance performance. You can enter any positive integer. If the property is empty, missing, or not set to an integer, a setting of 1 defaults. **For more information:** See Processing Auto Deposits (SDEP).
ECOMMERCE_DIRECTORY_PATH	Defines the location on the application server where the system downloads product offer and customer merge information. • The system downloads product offer information to this directory when you download e-commerce offer files (EOFR) and the Generate E-Commerce Offer Tables (M29) system control value is unselected. See Downloading E-Commerce Offer Files (EOFR) for processing details. • The system downloads customer merge information to this directory when Performing a Merge using the Working with Merge/Purge Sold-to Names (MMCS) menu option if the Generate E-Commerce Customer Merge Staging Files (H86) system control value is selected. • The system downloads the AvailabilityWeb XML file to this directory when it receives the E-Commerce Availability Web Request XML Message (AvailabilityWebRequest). This property is set by Oracle and cannot be changed. For more information, see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1)
END_ORDERIN_IJCT_ON_CONNECTION_ERROR	Indicates the action to take when the order API generates an Invalid XML error response, since this error can indicate a database connection problem. If this property is set to Y, when the order API generates an Invalid XML error response, it attempts to verify the database connection. If the attempt is unsuccessful, the system ends the ORDER_IN job and sends a support notification. Otherwise, if this property is set to N or blank or does not exist, the order API continues trying to process order messages in the event of an Invalid XML error response.

<table>
<tr><th>Property Name</th><th>Description</th></tr>
<tr><td>oms.job.purge.retain.days</td><td>The number of days to store jobs and generated reports and forms before they are eligible for deletion. Each time you restart Order Administration, the start up process deletes the following if they are older than the number of days specified here:
• archived reports, including PDF files, XML files, and text files.
• job logs.
• entries in the dbo.Jenasysjob table. This table is used to track submitted jobs.
If you do not define the retention days, Order Administration does not delete outdated documents.
Note:
• The deletion uses both the date and the time in determining whether to purge a document. For example, the current time is 7:00 a.m. and the oms.job.purge.retain.days is set to 30. If the report was created earlier than 7:00 30 days ago, it is eligible for deletion; otherwise, if it was created later than 7:00 30 days ago, it is not currently eligible.
• Certain text files might have a later date than the related PDF files, and so might not be eligible to purge at the same time as the related PDF. For example, if you view a PDF file for a form a day after creating it, Order Administration creates a text file logging that activity for the date when you viewed the PDF.</td></tr>
<tr><td>OROB_DIRECTORY_PATH</td><td>The location on the application server where the system creates Order Orchestration product, product location, and incremental inventory files to import into Order Orchestration.
This property is set by Oracle and cannot be changed.
See Order Orchestration’s Product, Product Location, and Incremental Inventory Import Process.</td></tr>
<tr><td>OROB_IMPORTS_URL</td><td>The URL used to call the Order Orchestration RESTful web service when sending product, product location, and incremental inventory data to Order Orchestration.
For example: https://order_broker_url:port, where order_broker_url is the URL used to connect to Order Orchestration and port if the port number used to connect to Order Orchestration.
See Order Orchestration’s Product, Product Location, and Incremental Inventory Import Process.</td></tr>
</table>

Property Name	Description
OVERLAY_DEBUG	If this property is set to Y, the Batch Inventory Overlay Upload writes entries in the Job.log file, for example: File: INV_OVERLAY_005.TXT Rows: 4 Success: 1 Errors: 3 Start Time: Mon Mar 04 16:03:11 EST 2019 End Time: Mon Mar 04 16:03:11 EST 2019 Time In Seconds: 0.041420431 Time In Minutes: 6.903405166666667E-4
PICKS_IN_SPOOL_FILE	The maximum number of pick slips in a single PDF document. The system continues to break pick slips into separate PDF documents using the criteria outlined under Sorting Pick Slips into Separate PDF Documents; however, if the number of pick slips in a PDF document reaches the number defined in the PICKS_IN_SPOOL_FILE setting, the system creates a new PDF document. **Note:** The system uses the PICKS_IN_SPOOL_FILE setting when printing pick slips through Streamlined Pick Slip Generation (WSPS) and Reprinting and Voiding Pick Slips (WVRP or WSVP). Also, the system uses this setting when printing Gift Acknowledgements. **Working with the pick slip form:** Once the system finishes processing one pick slip PDF document, you can open and print the pick slips in the document using the Forms Management Screen; you do not have to wait until all of the PDF documents for the pick slip generation run have generated. When printing pick slips, the system includes a PDF document sort number in the name of the document generated for the pick slip. For example, if the system generates two pick slip documents for warehouse 1, ship via priority 5, the system names the documents **PICKG.KBROWN.20090804.103001456_001.PDF** and **PICKG.KBROWN.20090804.103001456_002.PDF**, where **PICKG** is the name of the print program, **KBROWN** is the user ID of the person who generated the pick slips, **20090804.103001456** is the date and time stamp, and **001** and **002** is the PDF document sort number. See Form Naming Conventions for more information. **Recommended setting:** The recommended setting is 250 picks. The system also uses 250 as the default value if this setting is blank or missing.

Property Name	Description
	Example: When the PICKS_IN_SPOOL_FILE setting is 600, the system creates the following spool files for a pick slip generation run: • 50 pick slips for warehouse 1, ship via priority 1 (**PICKG.KBROWN.20090804.103000123_001.PDF**) • 300 pick slips for warehouse 1, ship via priority 5 (**PICKG.KBROWN.20090804.103001456_001.PDF**) • 510 pick slips for warehouse 1, ship via priority 9 (**PICKG.KBROWN.20090804.103003789_001.PDF**) • 75 pick slips for warehouse 2, ship via priority 1 (**PICKG.KBROWN.20090804.103006912_001.PDF**) • 225 pick slips for warehouse 2, ship via priority 5 (**PICKG.KBROWN.20090804.103007134_001.PDF**) • 25 pick slips for warehouse 2, ship via priority 9 (**PICKG.KBROWN.20090804.103008112_001.PDF**)

Property Name	Description
	When the PICKS_IN_SPOOL_FILE setting is 250, the system creates the following spool files for the same pick slip generation run: • 50 pick slips for warehouse 1, ship via priority 1 (**PICKG.KBROWN.20090804.103000123_001.PDF**) • 250 pick slips for warehouse 1, ship via priority 5 (**PICKG.KBROWN.20090804.103001456_001.PDF**) • 50 pick slips for warehouse 1, ship via priority 5 (**PICKG.KBROWN.20090804.103001456_002.PDF**) • 250 pick slips for warehouse 1, ship via priority 9 (**PICKG.KBROWN.20090804.103003789_001.PDF**) • 250 pick slips for warehouse 1, ship via priority 9 (**PICKG.KBROWN.20090804.103003789_002.PDF**) • 10 pick slips for warehouse 1, ship via priority 9 (**PICKG.KBROWN.20090804.103003789_003.PDF**) • 75 pick slips for warehouse 2, ship via priority 1 (**PICKG.KBROWN.20090804.103006912_001.PDF**) • 225 pick slips for warehouse 2, ship via priority 5 (**PICKG.KBROWN.20090804.103007134_001.PDF**) • 25 pick slips for warehouse 2, ship via priority 9 (**PICKG.KBROWN.20090804.103008112_001.PDF**) Notice that the system creates multiple spool files for pick slips in warehouse 1, ship via priority 5 and for pick slips in warehouse 1, ship via priority 9, based on 250 in the PICKS_IN_SPOOL_FILE setting.

Clearing the Cache for HTML Email Templates (CEML)

Purpose: To improve performance, Order Administration saves HTML email templates to a cache, and does not refresh the cache until you restart Order Administration. On occasions when you edit an HTML email template and would like to clear the cache without restarting Order Administration, you can use the Clear Email Template Cache option.

Does not apply to shipment emails generated through the Narvar Integration.

How to display this screen: Enter CEML in the Fast path field at the top of any screen, or select Clear Email Template Cache from a menu.

Completing this screen:

1. Select All templates from the Template cache name field.

2. Select Clear cache.

Working with Web Service Authentication (WWSA)

Web service authentication allows you to define a valid web service authentication user for each web service used by Order Administration.

Which web services are eligible? You can define web service authentication for the following:

- Inbound: Web services used to process inbound messages to Order Administration. See Inbound Web Service Authentication Process for Order Administration.
- To Order Orchestration: Web services used to process messages from Order Administration to Order Orchestration. See Web Service Authentication Process for Order Orchestration.
- To Customer Engagement: Web services used to process messages from Order Administration to Customer Engagement. See Web Service Authentication Process for Customer Engagement.
- To OCDS: Web services used for authentication for RESTful web service requests sent to the Omnichannel Cloud Data Service (OCDS). See Importing Enterprise Foundation Data through Omnichannel Cloud Data Service (OCDS) for background.
- To RICS: Web services used for authentication for the pre-order (backorder quantity update) notification message (RICS). See Enterprise Order Integration (Future Receipts and Active PO/Pre-Order Processing) for background.
- Job notifications: A web service to send a job notification to an external system. See *Using the Job Notification Outbound REST Message* in the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1) for more information.

Authentication types: Order Administration supports both basic and OAuth 2 authentication for inbound and outbound messages, although not all integrating systems support OAuth. See Basic or OAuth Authentication for a discussion.

For more information: See Setting Up Web Service Authentication for an overview and a discussion of the different types of authentication, and see the Oracle Retail Omnichannel Web Service Authentication Configuration Guide on My Oracle Support (2728265.1) for web service authentication configuration instructions.

In this topic:

- Basic or OAuth Authentication
- Inbound Web Service Authentication Process for Order Administration
  - Order Administration Web Services Eligible for Authentication
- Work with Inbound Web Service Authentication Screen
- Work with Inbound Web Service Authentication Users Screen
- Add User Window
- Work with Outbound Web Service Authentication Screen
- Change Outbound Web Service Authentication Screen

Basic or OAuth Authentication

Basic authentication requires the requesting system to pass a user ID and a password to authenticate a web service request. The destination system validates the user ID and password.

OAuth requires the requesting system to provide an access token with the web service request. Oracle Cloud Services use IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management) as the authenticating service. The requesting system will use its configured client ID and secret to request an OAuth token from IDCS or OCI IAM and then include that token in service requests.

If the xx Client ID and Client Secret are not defined in Work with Web Service Authentication (WWSA), Order Administration will use the application client and secret for authentication.

In addition to being more secure, OAuth provides better performance than basic authentication.

> **Note:**
>
> Only OAuth authentication is supported for inbound messages. You can use basic authentication for outbound messages if the external system requires it.

How Requests are Validated with OAuth

OAuth enables web service communication between applications using a token provided by IDCS or OCI IAM rather than a password, providing greater security. The requesting application first passes its:

- Client ID: Similar to a user ID in that it identifies a client application to the authentication service, in this case IDCS or OCI IAM. You can create client IDs through the Manage External Application Access page, in IDCS or OCI IAM, or through other applications, such as Customer Engagement.
- Client secret: A secure code that IDCS or OCI IAM creates for a client application, and that the client application passes to IDCS or OCI IAM for authentication. The client secret should be known only to the requesting application and to IDCS or OCI IAM.

When IDCS or OCI IAM receives the valid client ID and client secret, it then provides the token to the requesting application. The requesting application can then include the token in the web service request to the destination system, which validates the token with IDCS or OCI IAM.

For example, if your ecommerce system will communicate with Order Administration using OAuth, you can use this page to:

- Create a client ID and secret, which you can then provide to the ecommerce system.
- Create the associated web service authentication records for the ecommerce system.

With OAuth authentication:

The requesting system first passes a client ID and a client secret to an authenticating service, such as IDCS or OCI IAM.

- The authenticating service, such as IDCS or OCI IAM, generates a short-lived token.

- The requesting system submits the token to the destination system, rather than a password and user ID as with basic authentication.
- The destination system validates the token and client ID.

The following is required in order to support OAuth with Omnichannel products:

- The IDCS or OCI IAM client ID and client secret for the integrating system must be created through an Omnichannel cloud service, if it does not already exist.
- The system receiving the web service request needs to have a record of the client ID with assigned access for the web service API.
- A system sending the web service request needs to be able to request the token from IDCS or OCI IAM.
- The system sending the web service request needs to include the token so the system receiving the web service request can validate the request.

Configuration for outbound web service authentication: You need to specify an authentication type of either BASIC or OAUTH for each outbound web service from Order Administration. OAuth is supported for the following outbound web services:

- Order Broker 18.2 or higher, or Order Orchestration
- Customer Engagement 18.0 or higher
- Job Notification

OAuth is not currently supported for the RICS Service.

OAuth summary by product:

Product	Supports Receiving OAuth	Supports Sending OAuth
Order Broker	19.0 or higher	19.1.1 or higher
Order Broker Cloud Service	18.2 or higher	19.1 or higher
Order Orchestration	23.2.401.0	23.2.401.0
Order Management System	18.3 or higher; 19.0 or higher supports XOffice OnPrem validation of stores with parent ID. 19.0 or higher. See the **Manage External Application** page in Modern View for background.	19.1 or higher
Order Administration	23.2.401.0	23.2.401.0
Customer Engagement	18.0 or higher; 18.3or higher supports XOffice OnPrem validation of stores with parent ID.	not currently supported

For more information: See the Oracle Retail Omnichannel Web Service Authentication Configuration Guide on My Oracle Support (2728265.1) for web service authentication configuration instructions.

Inbound Web Service Authentication Process for Order Administration

When an external system calls an Order Administration web service, the external system sending the message to Order Administration must send authentication information in the HTTP header of the message.

Oracle Identity Cloud Service: When you use IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management) for password authentication, you do not define passwords in Work with Web Service Authentication (WWSA) for inbound web services; instead, you can use the Manage External Application Access page in Modern View to create web service authentication records for client applications created in IDCS or OCI IAM that use OAuth authentication. See Basic or OAuth Authentication for a discussion, and see Oracle Identity Authentication (IDCS or OCI IAM) in the Administration Guide.

When Order Administration receives an inbound web service request:

- If the web service passes authentication, the web service continues with regular processing.
- If the web service fails basic authentication, the web service returns a 401 error.

Order Administration Web Services Eligible for Authentication

You must define web service authentication, either through this menu option or through the Manage External Application Access page in Modern View, for the following Order Administration web services.

- CWCustomer: This web service is used to process an *Inbound Customer Message (CWCustomerIn)* received from an external system. See *Generic Customer API* for more information.

  For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
- CWEmailRequest: this web service is used to process an Email Request Message (CWEmailRequest) received from an external system. See Store Pickup Confirmation Email Program (L48) for more information.
- CWMessageIn: This web service works with any of the integration layer processes set up through Working with Integration Layer Processes (IJCT). See XML Messages Processed By the *CWMessageIn Web Service* for a list of the messages processed by the CWMessageIn web service and see *CWMessageIn Web Service* for an overview.
- CWOrderIn: This web service is used to process an *Inbound Order XML Message (CWORDERIN)* from an external system. See *Generic Order Interface (Order API)* for more information.
- CWPickIn: This web service is used to process a *CWPickIn XML Message* from an external system. See *Generic Pick In API (Shipments, Voids, and Backorders)* for more information.
- CWReceiptIn: This web service is used to process a *PO Receipt In XML Message (CWReceiptIn)* from an external system. See *Purchase Order Receipt In API* for more information.
- CWServiceIn: This web service is used to process the following messages received from an external system:

  For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1)

  – *Order Transaction History Message (CWOrderTransactionHistory)* if its type attribute is CWOrderTransactionHistory. See *Generic Order Transaction History API* for more information.

  - *Order Line History In Message (CWOrdLnHstIn)* if its type attribute is CWOrdLnHstIn. See *Order Line History In API* for more information in the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
  - *Item Availability Request XML Message (CWItemAvailabilityWeb)* if its type attribute is CWItemAvailabilityWeb. See *Item Availability API* for more information.
  - E-Commerce Cancel Request Message (CWCancel) –) if its type attribute is CWCancel. and see E-Commerce Cancel Process for more information.
  - *E-Commerce Catalog Request Message (CWCatRequest)* if its type is CWCatRequest. See *E-Commerce Catalog Requests* for more information.
  - CWProcessIn Message if its type attribute is CWProcessIn. See *Using the CWProcessIn Message to Start a Periodic Process* for more information.

  See the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1)

- JMSQueue. This web service is used during Advanced Queuing to read from a queue in the queuing database.
- OrderMaintenance. These web services are available to lock or unlock orders, add an order detail line, or cancel an order detail line or an order ship-to. See the Order Administration Order Maintenance Web Service Guide on My Oracle Support (ID 2953017.1) for more information.
- PaymentToken. This web service facilitates refund processing against the original payment in an external system, such as Xstore, for orders that billed through Order Administration, without requiring the customer to submit a credit card for the refund. This option is available for EFTConnect pay types. Oauth is required. See the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1) for details.
- PrivateDataRequest RESTful web service. This web service is used to process a Get Personal Data Request and Forget Personal Data Request from an external system. See the Personal Data API in the Data Security Guide on My Oracle Support (ID 2953017.1) for more information.
- ProcessIn. This RESTful web service is used to start a periodic process. See *Using the ProcessIn REST Message to Start a Periodic Process* for more information.
- Storage. This RESTful web service is used to upload, download, delete, or inquire on files imported or exported through the File Storage API.

Job Notification Outbound Message. This web service is used to notify an external system of a periodic process or job completion. See U*sing the Job Notification Outbound REST Message* for more information.

See the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Work with Inbound Web Service Authentication Screen

Purpose: You can use this screen to review inbound web services, and advance to the Work with Inbound Web Service Authentication Users screen, where you can review the client IDs that have been configured for inbound web service authentication.

> **Note:**
>
> Only OAuth authentication is supported for inbound web services. You should use the Manage External Application Access option in Modern View to generate a client ID, obtain the client secret, and define web service access, rather than the Work with Inbound Web Service Authentication screen.

How to display this screen: Enter WWSA in the Fast path field at the top of any menu or select Work with Web Service Authentication from a menu.

Field	Description
Web Service	An Order Administration web service that requires web service authentication. Valid web services are: • CWCustomer • CWEmailRequest • CWMessageIn • CWOrderIn • CWPickIn • CWReceiptIn • CWServiceIn • JMSQueue • JobRun • OrderMaintenance • PaymentToken • PrivateDataRequest • ProcessIn • Storage Enter a full or partial web service name to display web services that contain your entry. See Order Administration Web Services Eligible for Authentication for a summary of each web service. Alphanumeric, 50 positions; optional.

Screen Option	Procedure
Review existing client IDs that are configured for web service authentication for each inbound web service.	Optionally, select Authentication for a web service to advance to the Work with Inbound Web Service Authentication Users Screen, described below, to review existing client IDs. **Note:** Instead of configuring web service authentication here, you should use the Manage External Application Access option in Modern View to generate a client ID, obtain the client secret, and define web service access, rather than the Work with Inbound Web Service Authentication screen.
Configure web service authentication for an external web service	Select Outbound Svcs to advance to the Work with Outbound Web Service Authentication Screen.

Work with Inbound Web Service Authentication Users Screen

Purpose: Optionally, use this screen to review the existing client IDs that have been configured for authentication for inbound web services.

> **Note:**
>
> Only OAuth authentication is supported for inbound web services. You should use the Manage External Application Access option in Modern View to generate a client ID, obtain the client secret, and define web service access. However, you can use this screen to review the existing client IDs that have been configured for web service authentication of inbound web services.

How to display this screen: Select Authentication for a web service on the Work with Inbound Web Service Authentication Screen.

Field	Description
Web Service	The web service requiring authentication. Alphanumeric, 50 positions; display-only.
User	The IDCS or OCI IAM Client ID of the client that requests the OAuth token. **About OAuth:** OAuth is a standard for web service authentication through the use of access tokens rather than passwords. When OAuth is used, the inbound web service request specifies a client ID and a temporary token for authentication, rather than a user ID and a password. You can use the Manage External Application Access page in Modern View to create web service authentication records for applications created in IDCS or OCI IAM that use OAuth authentication. Enter a full or partial user ID to display users that contain your entry. Alphanumeric, 100 positions; optional.

Screen Option	Procedure
Create a web service authentication user	You should not use this option to create a web service user. Instead, use the Manage External Application Access page in Modern View to create web service authentication records for client applications created in IDCS or OCI IAM and using OAuth authentication.
Delete a web service authentication user	Select Delete for a user. At the Are you sure you want to delete the web service user? window, select Yes to delete the user; otherwise, select No to cancel. You can also use the Manage External Application Access page in Modern View to delete web service authentication records for client applications created in IDCS or OCI IAM, if necessary,

Add User Window

Purpose: You should not use this window

How to display this screen: Select Create on the Work with Inbound Web Service Authentication Users Screen.

Field	Description
User	The web service authentication user ID. When you use IDCS (Oracle Identity Cloud Service) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management) for password authentication, this is the user ID or client ID defined in IDCS or OCI IAM. **About OAuth:** OAuth is a standard for web service authentication through the use of access tokens rather than passwords. When OAuth is used, the inbound web service request specifies a client ID and a temporary token for authentication, rather than a user ID and a password. Use the Manage External Application Access page in Modern View to create web service authentication records for client applications created in IDCS or OCI IAM that use OAuth, such as XOffice on premises. **When OAuth not used:** OAuth is not currently supported for web service requests to Order Administration from older versions of Order Broker. When OAuth is not supported, you should use the Work with Inbound Web Service Authentication screen (WWSA) rather than the Manage External Application Access page in Modern View. Alphanumeric, 100 positions. Add window: required.

Work with Outbound Web Service Authentication Screen

Purpose: Use this screen to define a valid web service authentication user and password for an external web service that requires web service authentication.

You must define web service authentication for each of your Order Administration companies that communicates with the external system. Unlike inbound web service authentication, outbound web service authentication is defined at the company level.

Web service authentication for messages to Order Orchestration or Customer Engagement occurs when the message is received in that application. The web service user for web service authentication on inbound messages to Order Orchestration or Customer Engagement must be defined in that application.

How to display this screen: Select Outbound Svcs at the Work with Inbound Web Service Authentication Screen.

Field	Description
Web Service	An external web service for which you can define a valid web service authentication user and password. **EFTConnect:** The web service used for payment definition and processing, including defining merchant accounts with payment processors and supported payment types. See the Payment Configurations screen in Modern View for more information. **Job Notification:** The Job Notification web service is used to notify an external system about the completion of a periodic process or a job. See *Using the Job Notification Outbound REST Message* in the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1) for more information. **Narvar Service:** Used for authentication of RESTful web service requests to generate shipment notification emails through the Narvar Integration. **Note:** Narvar currently supports only Basic authentication. **OCDS Service:** Used for authentication for RESTful web service requests sent to the Omnichannel Cloud Data Service. See Importing Enterprise Foundation Data through Omnichannel Cloud Data Service (OCDS) for background. **Customer Engagement:** Web services listed for Oracle Retail Customer Engagement are: • ORCE Customer • ORCE File Service • ORCE Loyalty • ORCE Purchase History • ORCE Stored Value Card • ORCE Registry See Oracle Retail Customer Engagement Web Services Eligible for Authentication for a summary of each web service.

Field	Description
	Order Orchestration: Web services listed for Order Orchestration are: • OROB Discovery • OROB Locate • OROB Purchasing See Order Orchestration Web Services Eligible for Authentication for a summary of each web service. **Oracle Retail Promotion Engine (ORPE) Web Service Authentication:** Used to create a new Outbound web service authentication record in Outbound Web Service Authentication (WWSA) screen in OACS. **Note:** Only OAuth Authentication is supported for this service and it will not work if Basic is selected. **RICS Service:** Used for authentication for the pre-order (backorder quantity update) notification message that is part of the Enterprise Order Integration (Future Receipts and Active PO/Pre-Order Processing). **Note:** RICS Service does not support OAuth authentication. See Basic or OAuth Authentication for more information on using OAuth. **Sales Audit File Service:** Used for OAuth authentication for submission of the RTLOG file to object storage for the Sales Audit module of the Oracle Retail Merchandising Foundation Cloud Service. Note that object storage is supported for version 21.0 or higher of the Sales Audit module. See Transmitting the RTLOG File to Object Storage for more information. Alphanumeric, 50 positions; optional.
User/Client ID	The web service authentication user defined for the web service, or the client ID to use for the web service for OAuth authentication. Enter a full or partial user name or client ID to display web service users that contain your entry. See Basic or OAuth Authentication for background. Alphanumeric, 100 positions; optional.
Authentication Type	Indicates the type of authentication to use for the outbound web service: • BASIC: Requests pass a user ID and a password for authentication of the web service. • OAUTH: Requests pass a client ID and a client secret for authentication of the web service. See Basic or OAuth Authentication for background.

Screen Option	Procedure
Define a valid web service authentication user and password or client ID and client secret	Select Change for a web service to advance to the Change Outbound Web Service Authentication Screen.
Configure web service authentication for an Order Administration web service	Select Inbound Svcs to advance to the Work with Inbound Web Service Authentication Screen.

Change Outbound Web Service Authentication Screen

Purpose: Use this screen to define whether the service uses basic or OAuth authentication, and to define a valid:

- User and password if using basic authentication for the web service.
- Client ID and client secret if using OAuth for the web service.

See Basic or OAuth Authentication for background.

How to display this screen: Select Change for a web service on the Work with Outbound Web Service Authentication Screen.

Field	Description
Web Service	The web service for which you wish to define web service authentication. Alphanumeric, 50 positions; display-only.
Authentication Type	Indicates the type of authentication to use for the outbound web service: • BASIC: Requests pass a user ID and a password for authentication of the web service. • OAUTH: Requests pass a client ID and a client secret for authentication of the web service. See Basic or OAuth Authentication for background. Also, see the Work with Outbound Web Service Authentication Screen for information on which outbound web services support basic or OAuth authentication. If you have difficulty seeing both authentication types: Both options for this field may be difficult to see in Internet Explorer if the Enable syncing Internet Explorer settings and data option is not selected at the Advanced tab of the **Internet Options** window for Internet Explorer.
User/Client ID	Depending on the setting of the Authentication Type, this field is: • User (basic authentication): A valid web service authentication user that can authenticate the web service using basic authentication. You must enter the user ID in the correct case. • This user must be defined in the destination system, such as Order Orchestration or Customer Engagement. • Client ID (OAuth authentication): A valid client ID that you can use, along with the client secret, to generate a temporary token for OAuth authentication. In IDCS or OCI IAM, this field is labeled as the Display Name for the client, for example, RGBU_OBCS_<RANDOM>_APPID, where OBCS identifies the application, and <RANDOM> is a series of 8 random characters. The client ID must be defined in the authentication service, such as IDCS or OCI IAM, as well as the destination system. If you use IDCS or OCI IAM, you create the user in IDCS or OCI IAM and import the user into the destination system. Alphanumeric, 10 positions; required.

Field	Description
Password/Client Secret	Depending on the setting of the Authentication Type, this field is: • Password (basic authentication): A valid web service authentication user that can authenticate the web service using basic authentication. You must enter the user ID in the correct case. The password assigned to the web service authentication user. Must match the password in the destination system. You can define both upper and lower case letters for the password. • Client secret (OAuth authentication): The client secret defined for the client ID in the authentication service, such as IDCS or OCI IAM, to generate a temporary token for OAuth authentication. You can regenerate the client secret For security reasons, the system masks the password or client secret on the screen and encrypts it in the database. Alphanumeric, 50 positions; required.

Working with Contact Center (WWCC)

Contact Center is the component of Modern View that allows a customer service representative to perform order entry as well as order inquiry and order maintenance functions.

Use this menu option to configure which fields display in Contact Center and the order in which fields display on the Order Search page in Contact Center.

In this topic:

- Contact Center Field Display Screen
- Contact Center Order Search Field Sequence Screen

Contact Center Field Display Screen

Purpose: Use this screen to configure which fields display in Contact Center. In addition, you can use this screen to define whether the Phone Number and Email fields in Contact Center display as a hyperlink to directly call or email the customer.

How to display this screen:

- Enter WWCC in the Fast path field at the top of any menu or select Work with Contact Center from a menu.
- Select Configure Field Display on the Contact Center Order Search Field Sequence Screen.

Available Fields to Display

The Available Fields to Display section of the screen lists the fields that are available to display in Contact Center that currently will not display in Contact Center.

To select fields for display: Highlight one or more fields that you wish to select and drag the fields over to the Selected Fields to Display section of the screen.

Selected Fields to Display

The Selected Fields to Display section of the screen lists the fields that will display in Contact Center.

To remove fields from display: Highlight one or more fields that you wish to select and drag the fields over to the Available Fields to Display section of the screen.

Select to set as a hyperlink

The Select to set as a hyperlink section of the screen allows you to define whether the Phone Number and Email fields in Contact Center display as a hyperlink to directly call or email the customer.

Phone set as a hyperlink:

- Selected = The Phone Number field in Contact Center displays as a hyperlink. When you select the Phone Number field in Contact Center, the system advances you to the default application used to initiate phone calls. If a default application is not defined, a window displays where you can select the application to use to call the customer.
- Unselected (default) = The Phone Number field in Contact Center displays as text only.

Email set as a hyperlink:

- Selected (default) = The Email field in Contact Center displays as a hyperlink. When you select the Email field in Contact Center, the system advances you to the default application used for email. If a default application is not defined, a window displays where you can select the application to use to email the customer.
- Unselected = The Email field in Contact Center displays as text only.

Fields Available for Configuration

The following fields are available to display or hide in Contact Center.

Field	Description
Affect Inventory	Defines whether the system reserves an item and reduces inventory for the item after shipment. Valid values are: • Selected = Reserve the item and reduce inventory. • Unselected = Do not affect inventory.
Arrival Date	The date an item is scheduled to be shipped to the customer. Alphanumeric, 6 positions, in user date format.
Backorder Priority	The backorder priority defined for a source code. The system defaults the backorder priority to orders assigned to the source code. • 9 = highest priority • 0 = lowest priority The Evaluate Backorders program runs in the background and matches available inventory to backorders. Numeric, 1 position.
Batch Number	Allows users to search orders based on the error order batch number value. Numeric, 5 positions.

Field	Description
Broker Delivery Type	Defines whether the order is fulfilled through the Order Orchestration Integration. Possible settings are: • Retail Pickup = The order originated in an external system and Order Administration ships the order to the originating retail store location, where the customer picks it up • Delivery = The order originated in an external system, and Order Administration ships the order directly to the customer • Ship for Pickup = The order originated in Order Administration, and Order Administration ships the order ships the order to a designated retail store location, where the customer picks it up • Store Pickup = The order originated in Order Administration, and the customer picks up the order in a designated retail store location where the inventory is currently available **Note:** This setting does not indicate whether the order includes any brokered backorder lines (in which Order Administration assigns backordered items to the Order Orchestration for fulfillment).
Calculate Shipping	Defines whether the system calculates and adds shipping charges to the order. • Selected = The system calculates shipping charges for the order. • Unselected = The system does not calculate shipping charges for the order; the freight method for the source code is ignored.
Cancel Backorder	Defines whether to automatically cancel items that are unavailable (backordered) with the first shipment on the order. Valid values are: • Selected = Cancel backordered items with first shipment. • Unselected = Do not cancel backordered items. If this field is selected, any unshipped line on an order is canceled during billing using the Auto Soldout Cancel Reason (C20), provided this system control value specifies a valid cancel reason code.
Cancel Date	The date the customer wants the order canceled if it has not been shipped. The order is not canceled automatically, but is listed on the Order Cancellation List. You can cancel the order manually or contact the customer to extend the deadline. Numeric, 6 positions (in user date format).
Coordinate Group	A number assigned to two or more items to ensure that they ship together. Numeric, 2 positions; display-only.
Coupon	A code that identifies the coupon applied to an order or order detail line. Alphanumeric, 6 positions; optional.

Field	Description
Coupon Amount	Indicates the amount of the discount. • If the coupon's Discount type is D, this is the dollar discount for the coupon; if this is an order-level coupon, the total dollar discount applies to the eligible order detail line with the highest unit price; if this is a detail-level coupon, the total dollar discount applies to this order line. The total discount amount is prorated against the quantity of the order line. • If the coupon's Discount type is %, this is the percentage discount for the coupon to apply to the eligible items on the order (order-level coupons) or the order detail line (detail-level coupons). Numeric, 13 positions with a 2-place decimal.
Customer Class	A code that categorizes customers at a high level for reporting purposes. You can use customer class codes to: • send offers to a limited group of customers. • restrict item sales to a group of customers. • bypass normal item reservation (If the customer is assigned to a class flagged to bypass reservation, then the bypass setting applies even if the Bypass reservation setting for the customer is unselected). • determine whether to prompt for user-defined fields in order entry. Alphanumeric, 2 positions.
Discount Percent	The percentage discount to apply to an order in Contact Center order entry. Controls whether this field is available at the Select Shipping Option and Enter Other Details step in Contact Center order entry. Does not control whether a discount percentage field is available anywhere else in Contact Center, such as through the Order Summary page. Regardless of this setting, entry of value in this field is restricted if integration to Oracle Retail Promotion Engine (ORPE) is enabled (SCV M77). **Note:** The Discount Percent option is available after the Weight field at the Contact Center Field Display Screen; it is not listed alphabetically. Numeric, 5 positions with a 2-place decimal.
Gift Wrap	A flag that identifies whether an item is gift wrapped. Valid values are: • Selected = Gift wrap the item. • Unselected = Do not gift wrap the item.

Field	Description
Offer Code	A code for the catalog, space, or television advertisement from which you accept quotes and orders. The offer defined for the quote or order controls how to calculate shipping and price items. However, if you override the offer for an item (if the customer is ordering from more than one catalog, for example), demand for the item is attributed to the offer associated with the item rather than the order. Demand represents the number and dollar value of orders placed against an offer. Offers are defined in and validated against the Offer table. You can create and work with offers using the Work with Offers (WOFR) menu option. Alphanumeric, 3 positions.
Phone	The customer’s telephone number. Alphanumeric, 14 positions.
Priority	Used by the Evaluate Backorders program to match items to backorders. Immediate Reservation If you use Immediate Reservation, this value determines the sequence in which orders with backordered items receive inventory. The Evaluate Backorders program uses the priority to determine which backorders receive stock first. Numeric, 1 position.
Purchase Order Number	The customer's purchase order number. Alphanumeric, 15 positions.
Quote Origin	Defines whether the order originated from a pre-order quote. • Selected = The order originated from a pre-order quote. • Unselected = The order did not originate from a pre-order quote.
Recalculate Shipping	Defines whether to recalculate shipping charges. • Selected = Recalculate shipping charges. • Unselected = Do not recalculate shipping charges.
Sales Representative	The person who is credited for making the sale. This is the person who is responsible for obtaining the customer's order; this may not be the same person who enters the order on the system. Sales representatives are defined in and validated against the Salesman table. You can create and work with sales representatives in the Work with Sales Representatives (WSLS) menu option. Numeric, 7 positions.
Sales Representative Store	The store associated with the sales representative.

Field	Description
Shipping	The total charge for shipping the quote or order, not including additional shipping charges. You can define additional shipping charges for a carrier to include standard freight; in this case, this field is blank. See the Add'l freight (Additional freight charges) field. This field also includes service charges by ship via, if any. This field also includes order weight charges based on the ship via defined for each ship to customer on the order. See Working with Ship Via Codes (WVIA). The system calculates shipping charges based on the freight method defined for the source code. If the system calculates freight as a percentage of the merchandise charges, there might be a penny variation in total freight amount due to rounding differences. Numeric, 13 positions with a 2-place decimal.
Source Code	The source code from the order header. Source codes are unique codes used to identify segments of your customer base or a rented list. Each source code is assigned to one offer and one division. Source codes control the freight and pricing method used on an order. Alphanumeric, 7 positions.
Warehouse	A code that identifies the warehouse from which merchandise on the order ships. A value appears in this field only if it was entered during order entry or order maintenance or was passed through the Order Orchestration Integration for a retail pickup or delivery order. Warehouse code: numeric, 3 positions.
Weight	The total shipping weight of the items on the order, excluding soldout, cancelled, and returned items. Numeric, 13 positions with a 3-place decimal.

Contact Center Order Search Field Sequence Screen

Purpose: Use this screen to define the order in which fields display on the **Search for Orders and Customers** page in Contact Center, as well as on the **Home** page.

How to display this screen: Select Configure Search Field Sequence on the Contact Center Field Display Screen.

When you advance to this screen, the system displays the configuration that is currently defined.

Delivered Order Information Settings: The delivered sort order for the Search for Orders panel in Contact Center is:

- Order Number
- Order Date
- Invoice Number
- Alternate Order Number
- Last 4 Digits of Payment Card
- Item ID and SKU

- Order Status
- Origin
- Pick Control Number
- User ID
- Sales Rep Number
- Batch Number

The delivered number of Order Quick Search fields is 1.

The delivered setting of the *Use Oracle Retail Customer Engagement Customer Number on Search* is unselected.

Delivered Customer Information Settings: The delivered sort order for the Search for Customers panel on the **Search for Orders and Customers** page, **Home** page, and search page of **Contact Center Order Entry** is:

- Email Address
- Phone Number
- First Name
- Last Name
- Company Name
- Postal Code
- Customer Number
- Match Code

The delivered number of Customer Quick Search fields is 6.

Field	Description
Search by Order Information Fields	The order in which to display the fields in the Search for Orders panel of the Search for Orders and Customers page, as well as the Home page in Contact Center. You can define the sort order of the following fields: • Order Number • Order Date • Invoice Number • Alternate Order Number • Last 4 Digits of Payment Card • Item ID and SKU • Order Status • Origin • Pick Control Number • User ID • Sales Representative Number Note: The Sales Representative Number field displays only if it has been selected for display on the Contact Center Field Display Screen. • Batch Number

Field	Description
Use Oracle Retail Customer Engagement Customer Number on Search	Indicates whether to search for customers at the Home page or the Search for Orders or Customers page in Contact Center, as well as in Contact Center Order Entry, based on the Order Administration customer number or the Customer Engagement customer number. **Note:** This setting applies only when the ORCE Customer Integration (L37) system control value is set to INTERACT. With this setting, Customer Engagement is the system of record for customers, so Order Administration searches for customers in Customer Engagement, and then uses the information returned from Customer Engagement to update the customer record in Order Administration. **About customer mapping between Order Administration and Customer Engagement:** The mapping of customer records between Order Administration and Customer Engagement uses the following fields: • The customer ID in Customer Engagement is stored as the customer's ORCE Customer ID (RELATE_ID) in Order Administration. • The Order Administration customer number is stored as an alternate key for the customer in Customer Engagement. Because a customer record in Customer Engagement can have multiple alternate keys, the ORCE_ALT_ID_OROMS in Working with Customer Properties (PROP)defines the alternate key used for the Order Administration customer number. **How this flag affects searching for a customer record at the Home page or the Search for Orders or Customers page in Contact Center and requesting a match from Customer Engagement:** If this flag is: • Selected, when the user enters a customer number while searching, Order Administration sends a request to Customer Engagement for a customer who is assigned that Customer Engagement customer ID. • Unselected, when the customer enters a customer number while searching, Order Administration sends a request to Customer Engagement for a customer who is assigned that number as an alternate key, based on the ORCE_ALT_ID_OROMS property setting. **Which customer number displayed in Modern View?** When the ORCE Customer Integration (L37) system control value is set to INTERACT and this flag is: • selected, the customer number displayed in Modern View is the Customer Engagement customer ID. • unselected, the customer number displayed in Modern View is the Order Administration customer number. **Things to note:** • Before selecting this setting, it is important to evaluate any potential confusion that might be caused by displaying the different number for the customer. • This setting does not affect how to update customers in Order Administration based on the information received from Customer Engagement. If Customer Engagement returns information on the customer, the

Field	Description
	customer record is still created or updated regardless of whether the flag is selected. • When this flag is not selected but the ORCE Customer Integration (L37) system control value is set to INTERACT, Customer Engagement returns any customer found that is assigned the entered customer number as an Order Administration alternate key, even if that customer did not previously exist in your Order Administration company. In this case, the customer record is created in Order Administration; or if a customer record already existed in your company with that customer number, the customer's name and address are updated with the information from Customer Engagement. • This flag is also used to determine the customer to retrieve through the Direct Link to Modern View option described in the Modern View online help.
Number of Order Quick Search Fields	The number of fields in the Search for Orders panel of the Search for Orders and Customers page, as well as the Home page in Contact Center in Contact Center. Based on this number, the system displays fields in the sort order sequence that you have defined, and once the maximum number is reached, you must select the Additional Order Search Fields link to display the remaining fields in the defined sort order. Example: If you have defined the following sort order: • Order Number • Order Date • Invoice Number • Alternate Order Number • Last 4 Digits of Payment Card • Item ID and SKU • Order Status • Origin • Pick Control Number • User ID • Sales Representative Number • Batch Number And you have entered 4 in the Number of Order Quick Search Fields, the system initially displays the Order Number, Order Date, Invoice Number, and Alternate Order Number fields in the Search for Orders panel. You must select the Additional Order Search Fields link to display the Last 4 Digits of Payment Card, Item ID and SKU, Order Status, Origin, Pick Control Number, User ID, Sales Representative Number, and Batch Number fields. **Note:** You must enter a number greater than 0 and equal to or less than the number of available fields (12) that display in the Search for Orders panel. Numeric, 2 positions; required.

Field	Description
Search by Customer Information Fields	The order in which to display the fields in Contact Center in the Search for Customers panel of the: • Search for Orders and Customer page • Home page • Contact Center Order Entry You can define the sort order of the following fields: • Email Address • Phone Number Note: The Phone Number field displays only if it has been selected for display on the Contact Center Field Display Screen. • First Name • Last Name • Company Name • Postal Code • Customer Number • Match Code
Number of Customer Quick Search Fields	The number of fields to display in Contact Center in the Search for Customers panel. Based on this number, the system displays fields in the sort order sequence that you have defined, and once the maximum number is reached, you must select the Additional Customer Search Fields link to display the remaining fields in the defined sort order. Example: If you have defined the following sort order: • Email Address • Phone Number • Last Name • Company Name • Postal Code • Customer Number • Match Code And you have entered 4 in the Number of Customer Quick Search Fields, the system initially displays the Email Address, Phone Number, Last Name, and Company Name fields when you are searching for a customer in Contact Center. You must select the Additional Customer Search Fields link to display the Postal Code, Customer Number, and Match Code fields. **Note:** You must enter a number greater than 0 and equal to or less than the number of fields that display in Contact Center for searching. Numeric, 2 positions; required.

Screen Option	Procedure
Change the sort order of the Search by Order Information Fields	Highlight one or more fields that you wish to move and drag the fields up or down to the preferred sort order.
Change the number of fields to initially display in the Search for Orders panel in Contact Center	Enter a number in the Number of Order Quick Search Fields field and select OK.

Screen Option	Procedure
Change the sort order of the Search by Customer Information Fields	Highlight one or more fields that you wish to move and drag the fields up or down to the preferred sort order.
Change the number of fields to initially display in the Search for Customers panel in Contact Center	Enter a number in the Number of Customer Quick Search Fields field and select OK.

Display Active Batch Jobs (DABJ)

Purpose: Use the Display Active Batch Jobs Screen to determine which batch jobs on the Job Management Screen are running successfully.

- Which Jobs are Active Batch Jobs?
- If a Batch Job is not on the Display Active Batch Jobs Screen
- Display Active Batch Jobs Screen

Display Active Batch Jobs

Which Jobs are Active Batch Jobs?

The Display Active Jobs screen displays the batch jobs that are running in the Order Administration application server across all servers, including jobs submitted through the ProcessIn message; see Using the ProcessIn REST Message to Start a Periodic Process in the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

If a job is listed but is not actually running, use the JOBCLN periodic function to correct. See Using the JOBCLN Function to Resolve Job Status Across Servers.

If a Batch Job is not on the Display Active Batch Jobs Screen

If the batch job is not displayed on the Display Active Batch Jobs Screen for any of the Order Administration application servers, the batch job is not really running, regardless of the status of the job on the Job Management Screen or the status of the process that submitted the job.

Display Active Batch Jobs Screen

How to display this screen: Enter DABJ in the Fast path field at the top of any menu or select Display Active Batch Jobs from a menu.

Column sort: You can sort on any column on this screen by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Active batch jobs are listed on this screen in job number sequence.

Field	Description
Job	A code identifying the batch job. See Periodic Functions Available to Schedule in the Implementation Guide for information on submitted job names. **Note:** Interactive jobs, such as the job started for each user session (for example, QPADEV0B9A), are not listed on this screen.

Field	Description
User	The user ID of the person who submitted the batch job.
Job Nbr	A system-assigned identification number to track the job. **Note:** The job_number returned to the ProcessIn Message identifies the job that starts the process; this number may not match the one displayed here, which identifies the job that was generated. Also, note that the job number changes when the job switches to a different host. See the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Start Time	The date and time when the job went into RUN status on the currently displayed Hostname, even if the job first started on a different host. In Thu Nov 19 15:03:58 EDT 2013 format, where: • Thu = the day of the week • Nov = the month • 18 = the day of the month • 15:03:58 = the time when the job started, in hour, minute, and second format • UTC = the time zone • 2020 = the year
Status	The status of the batch job on the Job Management Screen. Valid values are: • RUN = The batch job is running and the status of the job on the Job Management Screen is accurate. • MSG = The batch job is running, but the status of the job on the Job Management Screen is not accurate. • END = The batch job is running, but a user has manually ended the job on the Job Management Screen. • ERR = The batch job is running, but a user has manually ended the job on the Job Management Screen while its status was MSG. • RMV* = The batch job is running, but a user has removed the job from the Job Management Screen.
Hostname	Indicates where the job is currently running. This information is available to Oracle staff for troubleshooting purposes. Alphanumeric, 50 positions.
Last Program	The last program called by the job. Included for troubleshooting information. Not included for the billing update job (for example, BILL_UPD123, where 123 is the company number) or the deposit job (for example, AUTO_DEP123, where 123 is the company number). Alphanumeric, 50 positions.

Screen Option	Procedure
Refresh data listed on the screen	Select Refresh: • Newly running batch jobs are added to the screen. • Batch jobs that are no longer running are removed from the screen. • The status of batch jobs are updated. • The last program used by batch jobs are updated. **Note:** You receive the error Function key not allowed if you press F5 to refresh the screen; you must select Refresh in order to refresh the data on the screen.

Display Job History (DJHY)

Purpose: Use the Display Job History Screen to research the history of completed batch jobs. Job history displays in descending chronological order (newest to oldest).

Combining search criteria: When searching on this screen, you can combine search criteria to restrict the display to jobs that match all of your entries. For example, you can enter a Job name of PICK_GEN, a Start date of the previous Sunday, and a Start time of 2:00 p.m. (14:00:00) to display pick slip generation jobs started on the previous Sunday at 2:00 p.m. or later.

Tracking the total records evaluated and processed: The DEP_UPDATE (deposits) job and the PICK_GEN (pick slip generation) job also track the Total number of records evaluated and the Total number of records processed. If either of these numbers is equal to or greater than 1, the totals display when you place your cursor over the Job name for these jobs.

> **Note:**
>
> The system does not track total records evaluated and processed when you use the Reprocess Authorizations Screen (RPAA).

Display Job History Screen

How to display this screen: Enter DJHY in the Fast path field or select Display Job History from a menu.

Default sort: The job history records are sorted by default in descending chronological order (newest to oldest) based on start date and time. If multiple jobs have the same start date and time, they are sorted in ascending alphanumeric order.

Column sort: You can sort on any column on this screen by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Field	Description
Hostname	Indicates where the job is currently running. This information is available to Oracle staff for troubleshooting purposes. Optionally, enter a complete, valid host name to display jobs run on that server. Enter a full or partial server name to display job history records that start with your entry. Alphanumeric, 50 positions.
Job No	The system-assigned identification number to track the job. Optionally, enter a job number to display job history records that match your entry exactly. Numeric, 19 positions.
Job Name	The name of the job, such as PICK_GEN or CNTL_ASYNC. The BILL_UPD and AUTO_DEP jobs include the company number as a suffix, for example: BILL_UPD123 or AUTO_DEP123. For the DEP_UPDATE, and PICK_GEN jobs, place your cursor over the job name to display the Total number of records evaluated and the Total number of records processed. These totals display for a job only if at least one of the totals is equal to or greater than 1. Optionally, enter a full or partial job name to display job history records that contain your entry. Alphanumeric, 50 positions.
Job Queue	The job queue where the job runs, such as QSYSNOMAX or QBATCH. Not included for the BILL_UPD or AUTO_DEP jobs. Optionally, enter a full or partial job queue name to display job history records that match your entry. Alphanumeric, 10 positions.
Submitted By	The user ID of the person who submitted the job. Optionally, enter a full or partial user name to display job history records that contain your entry. Alphanumeric, 10 positions.
Start date	The date the job first started, even if it started originally on a different host than the displayed Hostname. Optionally, select a date and press Enter to display job history records from this date or later. Numeric, 6 positions (in user date format).
Start time	The time the job first started, even if it started originally on a different host than the displayed Hostname. Optionally, enter a full or partial time to see job history records with this start time or later. Numeric, 6 positions (HH:MM:SS, 24-hour format).
End date	The date when the job ended, if any. No date is displayed if the job is currently running, or if the BILL_UPD or AUTO_DEP job was submitted while another instance of the job for the same company was running. Numeric, 6 positions (in user date format).
End time	The time when the job ended, if any. No time is displayed if the job is currently running, or if the BILL_UPD or AUTO_DEP job was submitted while another instance of the job for the same company was running. Numeric, 6 positions (HH:MM:SS, 24-hour format).

Monitoring Jobs (WJMO)

The system collects the monitoring information in the Job Monitor Status table. You can review the monitoring information on the Work with Job Monitor Screen (WJMO)

Overview: Job Monitoring provides the ability to monitor jobs to ensure that they are running correctly.

The Job Monitor:

Collects monitoring information, such as:

- Last heartbeat date/time: the last date and time when the system verified the job was running.
- ast transaction date/time: the last date and time when a transaction was processed by the job.

The system collects the monitoring information in the Job Monitor Status table. You can review the monitoring information on the Work with Job Monitor Screen (WJMO).

> **Note:**
>
> If you use multiple application servers, the system collects monitoring information in the Job Monitor Status table across all application servers.

Performs an action when job monitor rules you set up for a job are met, such as:

- receiving an email so that you can react to the condition.
- running a periodic function. For example, you can define a job monitor rule that if the Controlling Async goes down, to run the periodic function that starts the Controlling Async. If you define a periodic function, you can also have the system notify you by email if the condition for the job monitor rule still exists after running the periodic function.

The monitor rules defined for a job can be based on the last update date and time, the last transaction date and time, or query results.

You can define monitor rules for a job on the Work with Job Monitor Rules Screen. When you schedule a job monitor rule, the rule becomes a scheduled job that you can review on the Scheduled Jobs screen.

Additional Job Monitoring

- The Long Running Jobs Monitor watches the batch jobs running on the Job Management Screen and sends a Long Running Jobs Monitor to a specified email address if a job runs without ending longer than a specified time. See Long Running Jobs Monitor for more information on this process and the setup requirements.
- Running a Periodic Process on Server Startup provides the ability when you restart Order Administration (see Restarting Order Administration) for the system to look at the settings in the Monitor Property Settings to determine the periodic process and its assigned periodic functions to run on server startup. See Running a Periodic Process on Server Startup for more information about this process and the setup requirements.

In this topic:

- Job Monitor Setup
- Which Jobs are Monitored?
- Job Monitor Examples
- Work with Job Monitor Screen (WJMO)
- Work with Job Monitor Rules Screen
- Create Job Monitor Rule Screen

Job Monitor Setup

Before you can use the Job Monitor, you must complete the required setup.

- Monitor Properties
- Job Monitor Rules
- Job Monitor Queries

Monitor Properties

The Monitor Properties in Working with Admin Properties (CPRP) contain the settings required to enable the Job Monitor.

Property Name	Description
ALLOW_JOB_ MONITOR	Indicates whether you wish to run the job monitor. Valid values: Y = Run the job monitor. N (default) or blank = Do not run the job monitor. In this situation, the only option on the Work with Job Monitor Rules Screen is to display a rule's settings. **Note:** Set this value to Y for all application servers.
JOB_MONITOR_QUERY_ DIRECTORY	The directory on the application server where you store queries used by the job monitor. An example directory is /domain/conf/ OACSFiles/JobMonitorQueries/, where domain is the installed location of Order Administration.
TRACK_ALERTS_IN_LOG	Indicates whether you log all alerts generated by the job monitor. Valid values: Y = Log all alerts generated by the job monitor in the Alert Log. N or blank = Do not log alerts generated by the job monitor.

Job Monitor Rules

Use the Work with Job Monitor Rules Screen to define monitor rules for a job. For each rule, you can define:

- how often the system evaluates the rule to determine if its condition is met.

- whether the system uses the last update date and time, the last transaction date and time, or query results to determine whether to act on the rule.
- the type of action to perform if the rule's conditions are met, such as:
  - receiving an email so that you can react to the condition.
  - running a periodic function. For example, you can define a job monitor rule that if the Controlling Async goes down, to run the periodic function that starts the Controlling Async. If you define a periodic function, you can also have the system notify you by email if the condition for the job monitor rule still exists after running the periodic function.

Job Monitor Queries

Create any queries for which you wish to receive an alert if the query results come back true. Once you create the query:

- Store these queries in the directory defined for the JOB_MONITOR_QUERY_DIRECTORY property.
- Create a job monitor rule for the **Query** job monitor on the Work with Job Monitor Rules Screen. For this job monitor rule:
- Select to Alert On Query and enter the name of the query that you created.
- Define a schedule when the system determines if the query results come back true.
- Define the action to take if the query results come back true.

Job Monitor Query Examples

Job Monitor Rule	Query Example
receive an alert when the number of records in the billing data queue is equal to or greater than 100	select 'Y' from dual where (Select COUNT(*) from Billing_Header_Data_Queue)>=100
receive an alert if the number of running jobs for the INVTRAN_IN integration layer job is not equal to 3	select 'Y' from dual where (Select COUNT(*) from JenasysJob where jobName in (select ilq_job_name from Integration_Process_Queue where ILP_Process='INVTRAN_IN' and ILQ_Enabled='Y') and status='RUN')=3
receive an alert if no orders were created for the current date	select 'Y' from dual where (select COUNT(*) from Order_Header where CMP_Company=555 and OHD_Order_date=FNSYNONDATE)>0

Which Jobs are Monitored?

The table below lists the jobs you can monitor on the Work with Job Monitor Screen (WJMO). For each job, this table lists:

- The name of the job.
- The type of information collected for each job.
- Heartbeat Only = the job is associated with a heartbeat that the system uses to verify that the job is still active. Currently, there are no jobs associated with a heartbeat only.
- Transactions Only = the job processes transactions.
- Heartbeat and Transactions = the job is associated with a heartbeat and processes transactions.

- Query = the job runs queries not related to the other jobs listed on the Work with Job Monitor screen.
- When the system collects the type of information.
- The purpose of the job.
- The menu option where you can work with the job.

> **Note:**
>
> - If you have the same job running more than once; for example, you have multiple Billing Async jobs running at the same time, the job displays on the Work with Job Monitor Screen (WJMO) only once.
> - If you have the same integration layer job running more than once; for example, you have multiple stored value card activation jobs, each job displays on the Work with Job Monitor Screen (WJMO).

Job	Information Collected	Updated When
MBJC Use Background Job Control (MBJC) to review and work with these jobs.		
BILL_ASYNC background job Processes updates related to shipments and returns.See Working with the BILL_ASYNC Job.	Heartbeat and Transaction date/time	Heartbeat date/time The job reads the billing async data queue every 30 seconds. Transaction date/time The system reads a record from the billing async data queue. **Note:** The system also updates the heartbeat date/time and transaction date/time when you end the asyncs.
CNTL_ASYNC background job Starts and ends each of the background ASYNC jobs. When you start the CNTL_ASYNC job, all of the background ASYNC jobs start; when you end the CNTL_ASYNC job, all of the background ASYNC jobs end. You cannot start or end an individual background ASYNC job.See Working with the CNTL_ASYNC Job.	Heartbeat and Transaction date/time	Heartbeat date/time The job reads the controlling async data queue every 30 seconds. Transaction date/time The system reads a record from the controlling async data queue. **Note:** The system also updates the heartbeat date/time and transaction date/time when you end the asyncs.

Job	Information Collected	Updated When
EBO_ASYNC background job Updates the system tables with reservation and backorder information whenever the inventory level for a backordered item increases. Inventory levels for an item increase when you process inventory transactions, receive purchase orders, or transfer merchandise from suspense.See Working with the EBO_ASYNC Job.	Heartbeat and Transaction date/ time	Heartbeat date/time The job reads the EBO async data queue every 30 seconds. Transaction date/time The system reads a record from the EBO async data queue. **Note:** The system also updates the heartbeat date/time and transaction date/time when you end the asyncs.
ORDR_ASYNC background job Updates the system tables with order and demand information as orders are entered and maintained. See Working with the ORDR_ASYNC Job.	Heartbeat and Transaction date/ time	Heartbeat date/time The job reads the order async data queue every 30 seconds. Transaction date/time The system reads a record from the order async data queue. **Note:** The system also updates the heartbeat date/time and transaction date/time when you end the asyncs.
OTHR_ASYNC background job Updates the system tables with purchase order information when purchase orders are entered, maintained, or received. See Working with the OTHR_ASYNC Job.	Heartbeat and Transaction date/ time	Heartbeat date/time The job reads the other async data queue every 30 seconds. Transaction date/time The system reads a record from the other async data queue. **Note:** The system also updates the heartbeat date/time and transaction date/time when you end the asyncs.
APIs		

Job	Information Collected	Updated When
CUSTIN CWCustomer web service Processes an Inbound Customer Message (CWCustomerIn received from an external system, such as a point-of-sale system. For more information, see the Order Administration Web Services Guide on https://support.oracle.com My Oracle Support (ID 2953017.1).	Transactions Only date/time	Transaction date/time The CWCustomer web service processes a CWCustomerIn message.
EMAILREQ CWEmailRequest web service Processes an Email Request Message (CWEmailRequest) received from an integrated point-of-sale system.	Transactions Only date/time	Transaction date/time The CWEmailRequest web service processes a CWEmailRequest message.
ORDERINAPI CWOrderIn web service Processes an Inbound Order XML Message (CWORDERIN) received from an external system, such as a web storefront. For more information, see the Order Administration Web Services Guide on https://support.oracle.com My Oracle Support (ID 2953017.1).	Transactions Only date/time	Transaction date/time The CWOrderIn web service processes a CWOrderIn message.
PICKINAPI CWPickIn web service Processes a CWPickIn XML Message received from a warehouse management system. For more information, see the Order Administration Web Services Guide on https://support.oracle.com My Oracle Support (ID 2953017.1).	Transactions Only date/time	Transaction date/time The CWPickIn web service processes a CWPickIn message.
RECEIPTIN CWReceiptIn web service Processes a PO Receipt In XML Message (CWReceiptIn) received from a warehouse management system. For more information, see the Order Administration Web Services Guide on https://support.oracle.com My Oracle Support (ID 2953017.1).	Transactions Only date/time	Transaction date/time The CWReceiptIn web service processes a CWReceiptIn message.
WPBJ Use Working with Drop Ship Background Jobs (WPBJ) to review and work with this job.		
COLLAB Processes transactions between Order Orchestration's Drop Ship Manager and Order Administration in the Order Orchestration Drop Ship Integration.	Heartbeat and Transaction date/time	Heartbeat date/time The job looks for transactions to process, based on the Delay Time defined for the job. Transaction date/time The job processes a transaction.

Job	Information Collected	Updated When
IJCT This list includes: • any outbound integration layer job that has program ILR0022 defined as its Outbound program, including any jobs that you create. • specific inbound integration layer jobs: – CUSTHIST – CUSTSRCH – INV_INQUIRY – INVTRANIN – ORDLINHIST – ORDTRNHIST – PROCESSIN – RETURNIN Use Working with Integration Layer Processes (IJCT) to review and work with these jobs.		
BILL_UPD At periodic intervals, processes deferred billing updates for records in the Invoice Header table whose Process Date field is 0. The Parameter defined for the BILLUPD periodic function how often the job processes the deferred billing updates. Example: If the Parameter is 60, the system looks for deferred billing updates to process every 60 seconds.See Delay Billing Updates (K85) for processing details.	Heartbeat and Transaction date/time	Heartbeat date/time The BILL_UPD job reads the IL Outbound Trigger table, based on the Parameter defined for the periodic function. Transaction date/time The BILL_UPD job processes a billing transaction. **Note:** This job is no longer associated with the IJCT process in Order Management System 21.2 or higher, or Order Administration.
BROKER Sends and receives order information and updates using Order Orchestration's message formats; see Sample Order Orchestration Messages for examples.	Heartbeat and Transaction date/time	Heartbeat date/time The BROKER job reads the IL Outbound Trigger table, based on the Outbound delay time defined for the job. Transaction date/time The BROKER job processes a broker transaction.
BROKER_ORD Sends and receives new order, pending cancellation requests, and other status updates using Order Orchestration's message formats; see Sample Order Orchestration Messages for examples.	Heartbeat and Transaction date/time	Heartbeat date/time The BROKER_ORD job reads the IL Outbound Trigger table, based on the Outbound delay time defined for the job. Transaction date/time The BROKER_ORD job processes a broker transaction.

Job	Information Collected	Updated When
CUST_OUT Generates an outbound CWCustomerDownload XML message when you create, change, or delete a customer. See Generic Customer Download API for an overview. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Heartbeat and Transaction date/ time	Heartbeat date/time The CUST_OUT job reads the IL Outbound Trigger table for CST customer download triggers, based on the Outbound delay time defined for the job. Transaction date/time The CUST_OUT job reads and processes a customer download trigger record in the IL Outbound Trigger table.
CUSTHIST Receives a CustHistRequest for customer order history or information on a specific order, and generates a response (CWCUSTHISTOUT or CWORDEROUT). See Generic Customer History API for an overview. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Transactions Only date/time	Transaction date/time updated when the job receives and processes a transaction.
CUSTSRCH Receives a CWCustomerInqRequest for information on one or more customers matching specific search criteria, and generates a CWCustomerInqResponse. See Generic Customer Inquiry (Search) API for an overview. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Transactions Only date/time	Transaction date/time updated when the job receives and processes a transaction.
INV_DOWNLOAD Sends inventory availability information to another system in the CWInventoryDownload message. See Generic Inventory Download API for an overview. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Heartbeat and Transaction date/ time	Heartbeat date/time updated by reading the IL Outbound Trigger table. If the table is empty, the system sleeps for the Outbound delay time and then reads the table again. Transaction date/time updated every time the system reads and processes a record in the IL Outbound Trigger table.

Job	Information Collected	Updated When
INV_INQUIRY Receives a CWInventoryInquiryRequest for inventory availability on a specific item/SKU and generates a CWInventoryInquiryResponse. See Generic Customer Inquiry (Search) API for an overview. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Transactions Only date/time	Transaction date/time updated when the job receives and processes a transaction.
INVOIC_OUT Sends invoice information in the CWInvoiceOut message to another system, such as a retail store, financial system, or warehouse management system. See Generic Invoice Download API for an overview. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Heartbeat and Transaction date/time	Heartbeat date/time updated by reading the IL Outbound Trigger table. If the table is empty, the system sleeps for the Outbound delay time and then reads the table again. Transaction date/time updated every time the system reads and processes a record in the IL Outbound Trigger table.
INVTRANIN Receives inventory transactions in the inCreateInvXaction message and updates inventory information, such as in the Item Location and Item Warehouse tables. Any errors create Item Transaction Error records. See Generic Inventory Transaction Upload for an overview.	Transactions Only date/time	Transaction date/time updated when the job receives and processes a transaction.
ITEM_OUT Sends item and SKU information in the CWItemOut message to another system, such as a retail store or warehouse management system. See Generic Item Download API.	Heartbeat and Transaction date/time	Heartbeat date/time updated by reading the IL Outbound Trigger table. If the table is empty, the system sleeps for the Outbound delay time and then reads the table again. Transaction date/time updated every time the system reads and processes a record in the IL Outbound Trigger table.

Job	Information Collected	Updated When
ORDCLNUP Order Cleanup job Rejects any orders that have been “abandoned” on the web storefront if, for example, the customer closes the browser window. This process uses the Time Limit for Suspended E-Commerce Orders (G43) system control value to determine the number of minutes to wait before rejecting an order. Only orders of the type specified in the E-Commerce Order Type (G42) system control value are eligible for cleanup. The system generates the E-Commerce Order Cleanup Log each time it deletes a suspended order. Each time the job rejects an order, it writes a record in the Deleted Order Table.	Heartbeat and Transaction date/time	Heartbeat date/time The job looks for orders to clean up every minute. The system also updates the heartbeat date/time when the job deletes an order. Transaction date/time The job deletes an order.
ORDLINHIST Receives order line history activity for a specified order line on an order, based on XML messages from an external system, such as a warehouse management system. See Order Line History In API. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Transactions Only date/time	Transaction date/time updated when the job receives and processes a transaction.
ORDTRNHIST Receives order transaction records for a specified order, based on XML messages from an external system, such as a warehouse management system. You can review the order transaction history records created on the Display Order History Screen. See Generic Order Transaction History API. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Transactions Only date/time	Transaction date/time updated when the job receives and processes a transaction.
PICK_OUT Sends a Pick Message from Order Administration (CWPickOut) for each pick slip generated. See Generic Pick Out API for an overview. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Heartbeat and Transaction date/time	Heartbeat date/time updated by reading the IL Outbound Trigger table. If the table is empty, the system sleeps for the Outbound delay time and then reads the table again. Transaction date/time updated every time the system reads and processes a record in the IL Outbound Trigger table.

Job	Information Collected	Updated When
PO_OUT Sends a CWPurchaseOrderOut message to a warehouse management system or an EDI vendor. See Generic Outbound Purchase Order API. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Heartbeat and Transaction date/ time	Heartbeat date/time updated by reading the IL Outbound Trigger table. If the table is empty, the system sleeps for the Outbound delay time and then reads the table again. Transaction date/time updated every time the system reads and processes a record in the IL Outbound Trigger table.
PROCESSIN Uses the CWServiceIn Web Service to receive the CWProcessIn message and submit the specified periodic process received from an external system. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Transactions Only date/time	Transaction date/time updated when the CWServiceIn web service receives and processes a CWProcessIn message.
RETURN_OUT Sends a Return Authorization Outbound XML Message (CWReturnRAOut) when a return authorization is created, changed, or deleted. See Outbound Return API for an overview. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Heartbeat and Transaction date/ time	Heartbeat date/time updated by reading the IL Outbound Trigger table. If the table is empty, the system sleeps for the Outbound delay time and then reads the table again. Transaction date/time updated every time the system reads and processes a record in the IL Outbound Trigger table.
RETURNIN Receives an Return Request Message (CWReturnIn) to create and process a return against a specified order line. Optionally, the process sends an Return Response Message (CWReturnOut) to the external system, indicating if the return processed successfully or if an error occurred. See Inbound Return API for an overview. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Transactions Only date/time	Transaction date/time updated when the job receives and processes a transaction.

Job	Information Collected	Updated When
SVC_OUT Sends a Stored Value Card Activation Request to a service bureau. The service bureau returns a Stored Value Card Activation Response to Order Administration. See Stored Value Card Purchase and Activation.	Heartbeat and Transaction date/time	Heartbeat date/time updated by completing a stored value card activation transaction then then sleeping for 2 seconds. Transaction date/time updated every time the SVC_OUT job processes an activation transaction.
SVC_REVRSL Sends a Stored Value Card Authorization Reversal to the service bureau. The service bureau sends a Stored Value Card Authorization Reversal Response to Order Administration. See Stored Value Card Authorization Reversal.	Heartbeat and Transaction date/time	Heartbeat date/time updated by completing a stored value card authorization reversal transaction then sleeping for 2 seconds. Transaction date/time updated every time the SVC_REVRSL job processes an authorization reversal transaction.
VENDOR_OUT Sends a CWVendorOut message to another system, such as a retail store or warehouse management system. See Generic Vendor Download API. For more information, see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Heartbeat and Transaction date/time	Heartbeat date/time updated by reading the IL Outbound Trigger table. If the table is empty, the system sleeps for the Outbound delay time and then reads the table again. Transaction date/time updated every time the system reads and processes a record in the IL Outbound Trigger table.
Query		
QUERY Runs queries not related to the jobs listed on the Work with Job Monitor screen.	Query Only	The system does not update the heartbeat date/time or transaction date/time for this job. See Job Monitor Queries for more information on how to set up the **Query** job monitor.

Job Monitor Examples

- Job Monitor Example: PICK_OUT
- Job Monitor Example: ORDER_IN

- Job Monitor Example: Query

Job Monitor Example: PICK_OUT

You want to be notified by email every day between 9AM and 5PM when the system does not update the Update Date and Update Time for the PICK_OUT integration layer job, indicating the job is no longer active. The system should send an email 2 minutes after the conditions for the job monitor rule are met (the update date and update time are NOT updated), and then check every 5 minutes to see if the rule's conditions are still met. After 10 minutes, the system should send another email.

You create a job monitor rule with the following rule settings:

- Frequency: Daily
- Start Time: 090000
- End Time: 170000
- Alert On: Update Time
- Alert After: 5 minutes
- Sleep Time: 5 minutes
- Re-alert After: every 10 minutes
- Action Type: Email

The system uses the following calculation to determine if the job monitor rule's conditions are met: current time - alert after minutes > last update time.

At 9:05 the system checks to see if the job monitor rule's conditions are met (the update date and time are not updated, indicating the job is not active). In this example, the PICK_OUT job is not active. The system sends a job monitor rule email to the specified To Email address and updates the Check date and Check time for the rule.

The job monitor rule sleeps for 5 minutes.

At 9:10 (9:05 + 5 minutes sleep), the system checks to see if the job monitor rule's conditions are met (the update date and time are not updated, indicating the job is not active). In this example, the PICK_OUT job is not active. Because the 10 minute re-alert time has been reached, the system sends a job monitor rule email to the specified To Email address and updates the Check date and Check time for the rule.

At 9:15 (9:10 + 5 minute sleep), the system checks to see if the job monitor rule's conditions are met (the update date and time are not updated, indicating the job is not active). In this example, the PICK_OUT job is not active; however, the Re-alert After interval has not been reached.

At 9:20 (9:15 + 5 minutes sleep), the system checks again. If the job monitor rule's conditions are met again, the system generates the job monitor rule email, based on the Re-alert After interval.

Job Monitor Example: ORDER_IN

You want to be notified by email every day between 9AM and 5PM when the system does not update the Transaction Date and Transaction Time for the ORDER_IN integration layer job, indicating web orders are no longer being received. The system should send an email 15 minutes after the conditions for the job monitor rule are met (the transaction date and time are NOT updated, indicating a web order was not received in the last 15 minutes), and then check every 30 minutes to see if the rule's conditions are still met. After 15 minutes, the system should send another email.

You create a job monitor rule with the following rule settings:

- Frequency: Daily
- Start Time: 090000
- End Time: 170000
- Alert On: Transaction Time
- Alert After: 15 minutes
- Sleep Time: 15 minutes
- Re-alert After: every 30 minutes
- Action Type: Email

The system uses the following calculation to determine if the job monitor rule's conditions are met: current time - alert after minutes > last transaction time.

At 9:15 the system checks to see if the job monitor rule's conditions are met (the transaction date and time are not updated, indicating web orders are no longer being received). In this example, the conditions are met. The system sends a job monitor rule email to the specified To Email address and updates the Check date and Check time for the rule.

At 9:30 (9:15 + 15 minutes sleep) the system checks again, but the Re-alert After interval of 30 minutes has not yet been met.

At 9:45 (9:15 + 30 minutes total sleep), the system checks to see if the job monitor rule's conditions are met (the transaction date and time are not updated, indicating web orders are no longer being received). In this example, the conditions are met and the 30 minute re-alert time has been reached. The system sends a job monitor rule email to the specified To Email address and updates the Check date and Check time for the rule.

Job Monitor Example: Query

You want to be notified by email every day between 9AM and 5PM when the number of unprocessed billing async records is equal to or greater than 500 records. The system should send an email 5 minutes after the query results are true, and then check every 10 minutes to see if the rule's conditions are still met. After 30 minutes, the system should send another email.

You create the following query and place the query in the JOB_MONITOR_QUERY_DIRECTORY:

select 'Y' from dual where (Select COUNT(*) from Billing_Header_Data_Queue)>=500

You create a job monitor rule with the following rule settings:

- Frequency: Daily
- Start Time: 090000
- End Time: 170000
- Alert On: Query
- Query: BILLINGRECORDS.TXT
- Alert After: 10 minutes
- Sleep Time: 10 minutes

- Re-alert After: every 20 minutes
- Action Type: Email

At 9:10, the system checks to see if the job monitor rule's conditions are met (the results for the BILLINGRECORDS.TXT query in the JOB_MONITOR_QUERY_ DIRECTORY are Y, indicating there are 500 or more unprocessed billing async records). In this example, the query results are met. The system sends a job monitor rule email to the specified To Email address and updates the Check date and Check time for the rule.

The job monitor rule sleeps for 10 minutes.

At 9:20 (9:10 + 10 minutes sleep), the system checks to see if the job monitor rule's conditions are met (the results for the BILLINGRECORDS.TXT query in the JOB_MONITOR_QUERY_ DIRECTORY are Y, indicating there are 500 or more unprocessed billing async records). However, the Re-alert After of 30 minutes has not yet elapsed.

At 9:30 (9:20 + 10 minutes sleep), the system checks In this example, the conditions are met and the 20 minute re-alert time has been reached. The system sends a job monitor rule email to the specified To Email address and updates the Check date and Check time for the rule.

Work with Job Monitor Screen (WJMO)

Purpose: Use this screen to review and work with the job monitor rules defined for a batch job.

How to display this screen: Enter WJMO in the Fast Path field at the top of any menu or select Job Monitor Status from a menu.

Column sort: You can sort on any column on this screen by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Jobs first display on this screen in alphanumeric job name sequence.

- To review the job with the most recent update, click on the Update Date field until an arrow pointing down displays next to it to display jobs in descending update date sequence.
- To review the job with the most recent transaction, click on the Transaction Date field until an arrow pointing down displays next to it to display jobs in descending transaction date sequence.

Field	Description
Job Name	The name of the job. Place your cursor over the job name to determine if the job is associated with a heartbeat and/or transactions. • Heartbeat Only = the job is associated with a heartbeat that the system uses to verify that the job is still active. Currently, there are no jobs associated with a heartbeat only. • Transactions Only = the job processes transactions. • Heartbeat and Transactions = the job is associated with a heartbeat and processes transactions. • Query = this job runs queries not related to the other jobs listed on the Work with Job Monitor screen. See Which Jobs are Monitored? for a list of jobs that display on this screen and whether the job is associated with a heartbeat and/or transactions. Alphanumeric, 10 positions; display-only.
Update Date	The date when a heartbeat was last processed for the job to verify that the job is still active. If the job also processes transactions, the system also updates this field when a transaction is processed. **Note:** If a job uses a heartbeat and processes transactions, the update date and time may be different from the transaction date and time. Numeric, 8 positions (in user date format); display-only.
Update Time	The time when a heartbeat was last processed for the job to verify that the job is still active. If the job also processes transactions, the system also updates this field when a transaction is processed. **Note:** If a job uses a heartbeat and processes transactions, the update date and time may be different from the transaction date and time. Numeric, 6 positions (HH:MM:SS format); display-only.
Transaction Date	The date when a transaction was last processed by the job. **Note:** If a job uses a heartbeat and processes transactions, the update date and time may be different from the transaction date and time. Numeric, 8 positions (in user date format); display-only.

Field	Description
Transaction Time	The time when a transaction was last processed by the job. **Note:** If a job uses a heartbeat and processes transactions, the update date and time may be different from the transaction date and time. Numeric, 6 positions (HH:MM:SS format); display-only.
Process	The menu option where you can work with the job. Click on this value to advance to the specified menu option.
Rules	Indicates whether any condition rules are defined for the job. Once rules are defined for a job, the color of the Rules icon changes to blue ().

Screen Option	Procedure
Work with the condition rules defined for a job	In the Action drop down list, select Rules for a job to advance to the Work with Job Monitor Rules Screen. **Note:** Once rules are defined for a job, the color of the Rules icon changes to blue ().
Refresh the screen with the most recent Update Date, Update Time, Transaction Date, and Transaction Time	Select Refresh.
Display all jobs in the Job Monitor Status, including jobs that were previously hidden	Select Show All. **Note:** You can use the Hide Job option on the Work with Job Monitor Rules Screen to hide a job so that it does not display on the Work with Job Monitor Screen (WJMO).

Work with Job Monitor Rules Screen

Purpose: Use this screen to define monitoring rules for a job. When these rules are met, you can have the system:

- Notify you by email.
- Run a periodic function, and if the conditions for the rule are still met after the defined sleep time, send an email when the re-alert time is reached.

The condition rules can be based on the last update date and time, the last transaction date and time, or query results.

> **Note:**
>
> If job monitoring does not run on the application server (the ALLOW_JOB_MONITOR property for the application server is set to N), the only option on this screen is to display a rule's settings.

How to display this screen: In the Action drop down list, select Rules for a job on the Work with Job Monitor Screen (WJMO).

Column sort: You can sort on the Rule and Status columns on this screen by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Field	Description
Job Name	The name of the job associated with the monitoring rules. This is the job you selected on the Work with Job Monitor Screen (WJMO). Alphanumeric, 10 positions; display-only.
Rule	The name of the job monitor rule. **Note:** When you schedule a job monitor rule, the system uses the first 10 positions of the rule name as the job name that displays on the Scheduled Jobs Screen. Alphanumeric, 25 positions; display-only.
When	Indicates how often the system monitors the job to see if it meets the rule's conditions, based on the Frequency, Start Time, and End Time defined for the rule on the Create Job Monitor Rule Screen. Alphanumeric, 40 positions; display-only.
Status	The status of the job monitor rule. Valid statuses are: • Unscheduled = The rule has been created, but it not in use. • Scheduled = The rule has been created and scheduled, but is not currently running. • Running = The rule is actively running. • Ending = The rule is in the process of ending. Alphanumeric, display-only.
Check Date	The date when the system last compared this rule to the monitoring information for the job to determine if the rule's conditions are met. Numeric, 8 positions (in user date format); display-only.
Check Time	The time when the system last compared this rule to the monitoring information for the job to determine if the rule's conditions are met. Numeric, 6 positions (HH:MM:SS format); display-only.

If you are reviewing the Work with Job Monitor Rules screen from an application server

Screen Option	Procedure
Create a job monitor rule	Select Create to advance to the Create Job Monitor Rule Screen.

Screen Option	Procedure
Hide this job from the Work with Job Monitor Screen (WJMO)	Select Hide Job. **Note:** To redisplay this job, including all other jobs that are hidden, select Show All on the Work with Job Monitor Screen (WJMO).
Review a job monitor rule	Select Display in the Action column for a job monitor rule to advance to the Display Job Monitor Rule screen. All fields on this window are display-only. See the Create Job Monitor Rule Screen for field descriptions. **Note:** This option is available if the status of the job is Unscheduled, Scheduled, Running, or Ending.
Change a job monitor rule **Note:** This option is available only if the Status of the job monitor rule is Unscheduled.	Select Change in the Action column for a job monitor rule to advance to the Change Job Monitor Rule screen. See the Create Job Monitor Rule Screen for field descriptions. **Note:** This option is available if the status of the job is Unscheduled.
Run a job monitor rule **Note:** This option is available only if the Status of the job monitor rule is Unscheduled or Scheduled.	Select Start in the Action column for a job monitor rule to change its status to Running. At the Confirm window, select OK to start running the rule; otherwise, select Cancel. **Note:** This option is available if the status of the job is Unscheduled or Scheduled and the start time is met. When you start a job monitor rule, the system changes the status of the job to Running.
Stop a job monitor rule **Note:** This option is available only if the Status of the job monitor rule is Running.	Select Stop in the Action column for a job monitor rule. At the Confirm window, select OK to stop running the rule; otherwise, select Cancel. **Note:** This option is available if the status of the job is Running. When you stop a rule, the system changes its status from Running to Ending, and then to Unscheduled or Scheduled.
Schedule a job monitor rule **Note:** This option is available only if the Status of the job monitor rule is Unscheduled.	Select Schedule in the Action column for a job monitor rule to change its status to Scheduled. At the Confirm window, select OK to schedule the rule; otherwise, select Cancel. **Note:** This option is available if the status of the job is Unscheduled. When you schedule a job monitor rule, the system displays the job on the Scheduled Jobs Screen. The first 10 positions of the job monitor rule name displays as the job name on the screen. If the job monitor rule runs a periodic process, the system also displays the periodic process on the Scheduled Jobs screen and schedules the periodic process to run 1 minute after the associated job monitor rule. Once the periodic process runs, the system removes it from the Scheduled Jobs screen.

Screen Option	Procedure
Unschedule a job monitor rule	Select Unschedule in the Action column for a job monitor rule to change its status to Unscheduled. At the Confirm window, select OK to schedule the rule; otherwise, select Cancel. **Note:** This option is available if the status of the job is Scheduled.
Delete a job monitor rule	Select Delete in the Action column for a job monitor rule. At the Confirm window, select OK to delete the rule; otherwise, select Cancel. **Note:** This option is available if the status of the job is Unscheduled.

Create Job Monitor Rule Screen

Purpose: Use this window to define settings for a job monitor rule.

How to display this screen: Select Create on the Work with Job Monitor Rules Screen.

Field	Description
Job Name	The name of the job associated with the monitoring rule. This is the job you selected on the Work with Job Monitor Screen (WJMO). Alphanumeric, 10 positions; display-only.
Rule	The name of the job monitor rule. **Note:** When you schedule a job monitor rule, the system uses the first 10 positions of the rule name as the job name that displays on the Scheduled Jobs Screen. Alphanumeric, 25 positions; required.
Frequency	How often the system monitors the job to see if it meets the rule's conditions. Valid values: • Daily: the system monitors the job for this rule every day. • Weekdays: the system monitors the job for this rule every Monday, Tuesday, Wednesday, Thursday, and Friday. • Weekends: the system monitors the job for this rule every Saturday and Sunday. • Monday: the system monitors the job for this rule every Monday. • Tuesday: the system monitors the job for this rule every Tuesday. • Wednesday: the system monitors the job for this rule every Wednesday. • Thursday: the system monitors the job for this rule every Thursday. • Friday: the system monitors the job for this rule every Friday. • Saturday: the system monitors the job for this rule every Saturday. • Sunday: the system monitors the job for this rule every Sunday. Alphanumeric; required.

Field	Description
Start Time	Defines the start time when the system monitors the job to see if it meets the rule's conditions. You must enter the start time in HHMMSS military format; for example, enter 07:00:00 to indicate a start time of 7 AM. **Note:** Valid entries are 00:00:00 - 23:59:59. The start time must be earlier than the end time. Numeric, 6 positions; required.
End Time	Defines the end time when the system monitors the job to see if it meets the rule's conditions. You must enter the end time in HHMMSS military format; for example, enter 17:00:00 to indicate an end time of 5 PM. **Note:** Valid entries are 00:00:00 - 23:59:59. The end time must be later than the start time. Numeric, 6 positions; required.
User	The user ID associated with the job monitor rule. The user ID defaults to the user that is creating or updating the rule, but you can override it. User IDs are defined in and validated against the User table. Alphanumeric, 10 positions; required.
Alert On	Defines the factor the system evaluates to determine if the job meets the rule's conditions. Valid values: • Update Time: The system evaluates the job's last update date and time to determine if the job meets the rule's conditions. • Transaction Time: The system evaluates the job's last transaction date and time to determine if the job meets the rule's conditions. • Query: The system evaluates the results of the query specified for the rule to determine if the job meets the rule's conditions. Alphanumeric, required.
Query	The name of the query whose results the system evaluates to determine if the job meets the rule's conditions. The query must be located in the directory defined in the JOB_MONITOR_QUERY_ DIRECTORY property. Alphanumeric, 25 positions; required if Alert On is set to Query.

Field	Description
Alert After	The number of minutes to wait before the system can initially generate an alert. Typically equal to or a multiple of the Sleep Time. Example: • Alert After is set to 10 minutes • Sleep Time is set to 5 minutes • Start Time is set to 08:00. Result: • Based on the Sleep Time, the system first evaluates the job's status at 8:05 (5 minutes after the start time). The number of minutes specified as the Alert After has not passed. • Based on the Sleep Time, the system then evaluates again at 8:10, and at that point the Alert After has been met. The system generates the alert. **Note:** If the Sleep Time is greater than the Alert After time, the initial alert is not generated until the Sleep Time elapses. For example, if the Alert After is set to 5 minutes, but the Sleep Time is set to 10 minutes, the system does not check the job's status until 10 minutes after the start time. For more information: See Job Monitor Examples for more examples. Numeric, 3 positions; required.
Sleep Time	The number of minutes to wait before checking or re-checking the condition to determine whether it is time to generate an alert. Used in combination with: • Alert After: How long to wait before generating the initial alert. • Re-alert After: How long to wait between checking whether to generate additional alerts. The Alert Time and Re-alert After Time would typically be multiples of the Sleep Time. For example, if the Sleep Time is 5 minutes, the Alert Time and Re-alert After Time might be 10 minutes or 15 minutes. See Alert After, above, and Re-alert After, below, for examples. Also, see Job Monitor Examples for more examples. Numeric, 3 positions; required.

Field	Description
Re-alert After	The number of minutes to wait before generating an alert after the initial alert is generated. Typically equal to or a multiple of the Sleep Time. Example: • Sleep Time is set to 5 minutes • Alert After is set to 5 minutes • Start Time is set to 8:00 • Re-alert After is set to 10 minutes. Result: • The system first evaluates the job's status at 8:05 (based on the Sleep Time) and generates the first alert (based on the Alert After time of 5 minutes). • The system checks again at 8:10 (based on the Sleep Time) and finds that the Re-alert After time has not elapsed. • The system then checks again at 8:15 (based on the Sleep Time) and finds that the Re-alert After time has elapsed, so it generates another alert. • The next time that another alert will be generated is 8:25. • The system continues to check every 5 minutes, and generates the re-alert each time an additional 10 minutes has passed. For more information: See Job Monitor Examples for more examples. Numeric, 3 positions; optional.
Action Type	Defines the type of action to take when the job meets the rule's conditions. Valid values: • Email: Send an email to the specified To Email. • Periodic Process: Run the specified periodic process. **Note:** When the Action Type is Periodic Process, define a From Email Alias, Subject, To Email, and Email Text to have the system send an email alert if the condition for the job monitor rule still exists after running the periodic function. The system will continue to send an email alert until the condition is no longer met or the end time is met. Alphanumeric, required.
Periodic Process	The code for the periodic process to run. Periodic processes are defined in and validated against the Periodic Process table. Alphanumeric, 10 positions; required if Action Type is Periodic Process.
Process Company	The code for the company to run the periodic process. Company codes are defined in and validated against the Company table. Numeric, 3 positions; optional.
From Email Alias	The "from" email alias to display with the "from" address for emails, for example, My Email Alias <no-reply@omni.retail.oraclecloud.com>. The actual "from" address is set by Oracle and cannot be changed. Alphanumeric, 50 positions; required if Action Type is Email.

Field	Description
Subject	The subject of the job monitor rule email. Alphanumeric, 50 positions; required if Action Type is Email.
To Email	The list of email addresses that receive the job monitor rule email. Each email address entered must be separated by a semi-colon (;). For example: email1@add.com;email2@add.com. See WJMOEmail Address Validation. Alphanumeric, 200 positions; required if Action Type is Email.
Email Text	The text to display in the body of the job monitor rule email. Alphanumeric, 255 positions; required if Action Type is Email.

5 Accounting Setup

Setting Up the Accounting Tables

This part describes how to access the accounting tables, how to create and maintain records within the tables, and how to change, delete or display the records within the tables.

- Working with Entities (WENT) describes creating, changing, deleting, and displaying entity codes.
- Working with Divisions (WDIV) tells you how to create, change, delete, and display divisions, how to assign a division to an entity, and how to display divisional history (summary statistics of a division's sales performance).
- Working with Pay Types (WPAY) explains how to create, change, delete, and display pay types. This topic includes information about specifying the financial conditions under which an order will go on hold and describing the characteristics of the credit cards you honor (for example, length of card number, leading digits, authorization and deposit services).
- Working with Banks (WBNK) discusses how to create, change, delete, and display bank information including bank codes and their descriptions and the transit number associated with a bank.
- Working with Accounting Periods (WACP) explains how to create, change, delete, display and close accounting period information including specifying year, start date, and end date for the period.
- Working with Currency (WCUR) includes how to create, change, delete, and display currency information.
- Working with Sales Representatives (WSLS) describes how to create, change, delete, and display sales representative information. This topic includes information about your sales representatives, the center to which they are assigned, and their commission and bonus structure.
- Salesman Associate Upload describes how to upload salesman information from an external system to create or update records the Salesman table.

Working with Entities (WENT)

Purpose: Use the Entities function to add or maintain entities, their descriptions, and override settings such as email options. Entities are an important component of the Order Administration sales reporting hierarchy, and can represent the business units within your company (for example, mail order, retail, wholesale). Every sale, return, exchange, discount, and write-off is attributed to an entity. Entities should represent any organization within your company that is held accountable for sales performance.

You must create at least one entity.

Email options: You can set entity-level or order type/entity-level overrides for email notifications generated by the system, including the text of the email template, the "from" email address, and whether to generate the *Outbound Email XML Message (CWEmailOut)* or an actual email directly to the customer.

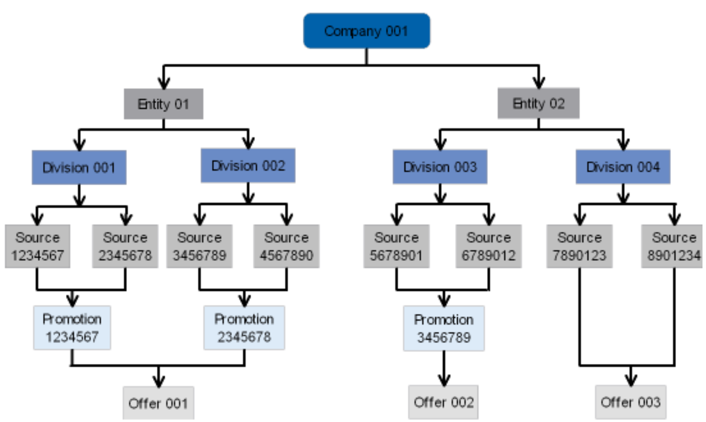
For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

You can also set up system control value overrides at the entity level.

In this topic:

- Order Administration Sales Reporting Hierarchy
- Related System Control Values and Settings
- Work with Entities Screen
- Create Entity Screen
- Work with Entity SCV Overrides Screen
- Edit Pricing Values Screen
- Work with Entity Return Address Screen
- Work with Entity Email Overrides Screen
- Change Email Override Screen
- Entity Email Override by Order Type Screen
- Create Entity Order Type Template Screen
- Change Entity Order Type Template Screen
- Display Entity Email Override Template Screen

Order Administration Sales Reporting Hierarchy



Related System Control Values and Settings

Purpose: These system control values allow you to define additional settings related to the use of entity in your company.

- Display Entity Description (F84): If this system control value is selected, the entity related to an order displays in order inquiry and at the Customer Selection

Screen in order entry. An entity is related to an order through the source code on the order header; when you create a source code, you must associate it with a division, and each division points to an entity. See the Order Administration Sales Reporting Hierarchy chart for an illustration.

> **Note:**
>
> Only the first five characters of the entity description display on the CTI Customer Selection screen.

- Track Customer History at Entity Level (F89): If this system control value is selected, the system tracks each customer's order history separately based on the entity associated with the source code on the order header. You might choose to break out customer history by entity if you have multiple catalogs with distinct identities, yet sharing the same customer list and inventory.

Work with Entities Screen

Purpose: Use this screen to review the entities in your company, or to create, change, delete, or display an entity.

How to display this screen: Enter WENT in the *Fast Path* field at the top of any menu or select Work with Entities from a menu.

Field	Description
Entity	A code that represents the entity. *Numeric, 3 positions; optional.*
Description	The description of the entity code. *Alphanumeric, 25 positions; optional.*

Screen Option	Procedure
Create a new entity code	Select Create to advance to the Create Entity Screen.
Change entity information	Select Change for an entity to advance to the Change Entity screen. At this screen you can change anything but the entity code. See Create Entity Screen for field descriptions.
Delete entity information	Select Delete for an entity to delete it. The system does not display an additional warning if you have taken orders for this entity; use care in deleting.
Display entity information	Select Display for an entity to advance to the Display Entity screen. You cannot change any information on this screen. See Create Entity Screen for field descriptions.
Work with system control value overrides by entity	Select Control Value Overrides for an entity to advance to the Work with Entity SCV Overrides Screen.
Enter or change the return address for printing on customer return labels from the web storefront	Select Return address for an entity to advance to the Work with Entity Return Address Screen.

Screen Option	Procedure
Work with entity-level or entity/order type-level overrides for email notifications	Select Email overrides for an entity to advance to the Work with Entity Email Overrides Screen.
Work with user defined fields	Select User Field for an entity to advance to the Work with User Fields Screen.

Create Entity Screen

Purpose: Use this screen to create an entity code.

How to display this screen: Select Create at the Work with Entities Screen.

Field	Description
Entity	A code that represents an entity. Entities are an important component of the Order Administration sales reporting hierarchy. Entities can represent the business units within your company (for example, mail order, retail, wholesale). Every sale, return, exchange, discount, and write-off is attributed to an entity. Entities should represent any organization within your company that is held accountable for sales performance. You must create at least one entity. *Numeric, 3 positions.* *Create screen: required.* *Change screen: display-only.*
Description	The description of the entity. *Alphanumeric, 25 positions; required.*
The following address fields may appear on printed forms if your unique printing programs support it.	N/A
Name	The name of the entity. *Alphanumeric, 30 positions; optional.*
Address	Two lines of address information. You must enter at least one line of address information if you complete any of the remaining address fields. *Alphanumeric, 32 positions each; required if you complete any of the address fields.*
City	The city where the entity is located. *Alphanumeric, 25 positions; required if you complete any of the address fields.*
State	The state where the entity is located. The system validates that this is a valid state associated with the Country you enter. See Setting Up the Country Table (WCTY). *Alphanumeric, 2 positions; required if you complete any of the address fields.*

Field	Description
Zip	The zip or postal code where the entity is located. Your entry is not validated against the Postal Code table, and no formatting is applied. *Alphanumeric, 10 positions; required if you complete any of the address fields.*
Country	The country where the entity is located. Your entry is validated against the Country table; see Setting Up the Country Table (WCTY). *Alphanumeric, 3 positions; required if you complete any of the address fields.*
Phone #/Extension	The phone number and extension. You can define a telephone number format to map to the phone numbers operators enter into the system. Telephone number formats are defined by arranging numbers and special characters such as hyphens and parenthesis in the same order and position as the numbers in a phone number would display. When an operator enters a phone number, the system compares the number of numeric characters in the phone number with the telephone number formats you have defined. In order to match a format, the phone number must have the same number of numeric positions as a telephone number format. If the system cannot find a match, the phone number does not map to a telephone number format and is saved as it was entered by the operator. **Telephone Number Format Examples** An operator enters a phone number containing 10 numbers: 5085550100 The telephone number format used in the United States to represent an area code, local exchange and local phone number is: (508) 555-0100 When an operator enters a phone number containing 10 numbers (as in the example), the phone number displays so that the first 3 positions are in parenthesis and a hyphen is between the sixth and seventh numbers, regardless of how the operator entered it into the system. If an operator enters a phone number containing 6 numbers, for example 5550100 and no format exists for 6 numbers, the phone number would display as it was entered (4293197). See Setting Up the Zip/City/State (Postal Code) Table (WZIP). *Alphanumeric, 14 positions (phone number) and 4 positions (phone extension); optional.*
Retail Brand	The retail brand associated with the entity. Retail brands are used for integration with Order Orchestration's Drop Ship Manager to identify the retail brand for a drop shipment. A retail brand may be associated with one or more entities. Retail brands are defined in and validated against the Retail Brand table. See Working with Retail Brands (WRBD). This field is enterable only if the Use OROB Drop Shipping (H13) system control value is selected. *Alphanumeric, 3 positions; required.*

Work with Entity SCV Overrides Screen

Purpose: Use this screen to work with overrides to System Control table settings based on entity.

Available SCV overrides: Pricing values are available for override at the entity level; see Edit Pricing Values Screen.

How to display this screen: Select Control Value Overrides for an entity at the Work with Entities Screen.

Field	Description
Entity	The entity you selected at the Work with Entities screen. *Numeric, 3 positions; display-only.*
Description	The description of the selected entity. *Alphanumeric, 25 positions; display-only.*
SCV	A number that identifies the system control value to the system. This is an internal code that programs reference when checking a specific system control value. *Alphanumeric, 3 positions; optional.*
App (Application area)	The application area (for example, Order Entry or O/E) to which this system control value belongs. Application areas are used to categorize similar control values, secured features, and menu options by functional area. Once an application area has been assigned to a control value, it cannot be changed. *Alphanumeric, 3 positions; optional.*
Grp (Application group)	The application group to which this system value relates. Application groups further define functions within an application area and are used to categorize similar control values, secured features, and menu options. Examples of application groups with the Order Entry application area are pricing (PRI) and tax. *Alphanumeric, 3 positions; optional.*
Description-value	The description of the system control value. *Alphanumeric, 60 positions; display-only.*
Active	This field indicates whether the *Active override* flag for the entity-level system control value has been selected. If you select this flag, the system updates the Entity System Control Value table. Also, the entity-level settings will override your company-wide entries in the System Control table for any activity within this entity. Valid values are: • Y = Entity-level settings override company-wide system control value settings. • N =Entity-level settings are not in effect.

Screen Option	Procedure
Change an entity-level system control value setting	Select Change for system control value to advance to the Edit Pricing Values Screen.

Screen Option	Procedure
Display an entity-level system control value setting	Select Display for a system control value to advance to the Edit Pricing Values Screen.
View the history of changes to system control value overrides for this entity	Select View History to advance to the Display All System Control Value History Screen. See Display System Control Value History Screen for a discussion of the System Control Value History table.

Edit Pricing Values Screen

Purpose: Use this screen to work with entity-level overrides to your company-wide pricing values in the System Control table. Pricing values control how the system determines item price in order entry and order maintenance.

How to display this screen: Select Change for the Pricing Values system control value at the Work with Entity SCV Overrides Screen.

> **Note:**
>
> Each of the pricing values are described under Pricing Values (B31).

Field	Description
Entity	The entity you selected at the Work with Entities screen. *Numeric, 3 positions; display-only.*
Application code	The application area (for example, Order Entry or O/E) to which this system control value belongs. Application areas are used to categorize similar control values, secured features, and menu options by functional area. Once an application area has been assigned to a control value, it cannot be changed. *Alphanumeric, 3 positions; display-only.*
Active override	If you select this flag, the system updates the Entity System Control Value table. Also, the entity-level settings will override your company-wide entries in the System Control table for any activity within this entity. Valid values are: • Select = Entity-level settings override company-wide system control value settings. • Unselected (default) = Entity-level settings are not in effect.
Application group	The application group to which this system value relates. Application groups further define functions within an application area and are used to categorize similar control values, secured features, and menu options. Examples of application groups with the Order Entry application area are pricing (PRI) and tax. *Alphanumeric, 3 positions; display-only.*

Instructions:

1. Select the Active override flag to have the entity-level pricing values override the company-wide settings.

2. Optionally, complete each of the pricing values. See Pricing Values (B31).

How the system determines how to price orders: When you enter an order, the system determines how to select prices at the time you complete the order header information, including the source code. The system checks the Active override setting for the entity associated with the division specified for this source code. If the Active override flag is selected, the system uses the entity-level pricing values to determine the price of each item on the order. If the Active override flag is unselected, the system uses the company-wide pricing levels from the System Control table.

Work with Entity Return Address Screen

Purpose: Use this screen to create or edit the entity address to print on return labels. The system uses this address only if your web storefront supports printing these labels for return authorizations when customers enter returns on the storefront. See the E-Commerce Interface for more information.

If there is no entity return address: The system uses the address you specify for the company at the Work with Company Return Address Screen if you do not define a return address for the entity associated with an order. An order is associated with an entity through the division assigned to the source code on the order header.

If there is no entity or company return address: If a return address is not specified for the entity associated with the order or for the company, the system uses the address for the Default Warehouse (A04).

How to display this screen: Select Return address for an entity at the Work with Entities Screen.

Completing this screen: Enter the address to appear on return labels for use when customers enter returns through your web storefront. See the Work with Company Return Address Screen for field descriptions. To delete the return address, select Delete.

Work with Entity Email Overrides Screen

Purpose: Use this screen to review and work with email notification overrides for an entity. You can override the "from" email alias, the boilerplate text to print above and below the items, or the *XML only?* checkbox. You can also set up order type/entity overrides for certain notification types.

> **Note:**
>
> An entity-level override is not available for the purchase order email, as the purchase order is not related to a specific entity.

For more information: See Email Setup within Order Administration and Working with E-Mail Notification Templates (WEMT).

How to display this screen: Select Email overrides for an entity at the Work with Entities Screen.

Field	Description
Entity	The entity you selected at the Work with Entities Screen. The description of the entity is to the right. *Entity: numeric, 3 positions; display-only.* *Description: alphanumeric, 30 positions; display-only.*
Type	The email notification type to use the "from" email alias specified for the Directory address and the template text. Email notification types are: • Backorder 1st Notice • Backorder 2nd Notice • Backorder Continue Notice • C/C Credit Acknowledgment • Contact Us • Credit Card Decline • Loyalty Activate Notice • Loyalty Deactivate Notice • Maintenance Failure • Membership Cancel Confirmation • Order Cancellation • Order Confirmation • Order Line Cancellation • Quote Confirmation • Return Confirmation • Shipment Confirmation • Soldout Notification • Store Pickup Confirmation • Stored Value Card Notification **Note:** All notification types available at the entity level are listed, regardless of whether you use the notification in this entity or in your company. The purchase order email template is available only at the company level, since the purchase order is not related to a specific entity. *Alphanumeric, 27 positions; display-only.*
From email alias	The alias to display with the "from" address for emails, for example, My Email Alias <no-reply-omni@oraclecloud.com>. The actual "from" address is set by Oracle and cannot be changed. *Alphanumeric, 50 positions; optional.*

Option	Procedure
Create or change the entity-level override of the “from” email alias and/or template and *XML only?* setting for an email notification type	Select Change for an email notification type to advance to the Change Email Override Screen. **Note:** There is no Create option at this screen; use the Change option to create a new template.
Display the entity-level override of the “from” email alias and/or template and *XML only?* setting for an email notification type	Select Display for an email notification type to advance to the Display Email Override screen. See the Change Email Override Screen for field descriptions.
Delete an email template at the entity level	Select Change for a template to advance to the Change Email Override Screen, where you can delete the contents of the template.
Work with order type/ entity email overrides for the order, shipment, order cancel, or order line cancel notifications	Select Order Type to advance to the Entity Email Override by Order Type Screen.

Change Email Override Screen

Purpose: Use this screen to enter, change, or delete entity-level email override information. See Email Text Templates and “From” Email Alias for a discussion.

How to display this screen: Select Change for an email notification type at the Work with Entity Email Overrides Screen.

Field	Description
Entity	The entity you selected at the Work with Entities Screen. The description of the entity is to the right. *Entity: numeric, 3 positions; display-only.* *Description: alphanumeric, 30 positions; display-only.*

Field	Description
Notice type	The email notification type to use the “from” email alias specified for the *Directory address* and the template text. Email notification types are: • Backorder 1st Notice • Backorder 2nd Notice • Backorder Continue Notice • C/C Credit Acknowledgment • Contact Us • Credit Card Decline • Loyalty Activate Notice • Loyalty Deactivate Notice • Maintenance Failure • Membership Cancel Confirmation • Order Cancellation • Order Confirmation • Order Line Cancellation • Quote Confirmation • Return Confirmation • Shipment Confirmation • Soldout Notification • Store Pickup Confirmation • Stored Value Card Notification **Note:** All notification types available at the entity level are listed, regardless of whether you use the notification in this entity or in your company. However, the purchase order email template is available only at the company level, since the purchase order is not related to a specific entity. *Alphanumeric, 27 positions; display-only.*

Field	Description
XML only	Indicates whether to generate the *Outbound Email XML Message (CWEmailOut)* rather than an actual email notification for notices generated for this entity. This XML message includes additional information that is not included in the standard email notice. You might choose to generate the XML message so that you can use the additional information to produce a reformatted HTML email that includes promotional material. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Valid values are: • Selected = Generate the *Outbound Email XML Message (CWEmailOut)* rather than an actual email • Unselected = Generate the email notification rather than the outbound XML message For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). **Note:** • This setting applies only if this is the email text template used to generate the notification, as described under HTML Email or Outbound Email XML Message? for a discussion. • This option is not available for the loyalty activation/deactivation email templates. See *Outbound Email API* for an overview, and see HTML Email or Outbound Email XML Message? for a discussion of when the system uses this setting as an override at the entity level. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Field	Description
From email alias	The alias to display with the “from” address for emails, for example, My Email Alias <no-reply@omni.retail.oraclecloud.com>. The actual “from” address is set by Oracle and cannot be changed. The system uses the following hierarchy in selecting the “from” email alias: 1. Order Type/Entity: If a *From email alias* is specified at the Create Entity Order Type Template Screen or Change Entity Order Type Template Screen, use this alias; otherwise, 2. Entity: If a *From email alias* is specified here for the email notification type, use this alias; otherwise, 3. Company: If a *From email alias* is specified at the Change Company Screen or the Change Company screen, use this alias; otherwise, 4. Display just the actual email address of no-reply@omni.retail.oraclecloud.com without including an alias *Alphanumeric, 50 positions; optional.*
Text to print above items	The standard text to include in each email above the information specific to the order. See the HTML Format Notification Samples and Contents and the Simple Format Notification Sample. See Email Text Templates for information on the hierarchy that determines which text template to use. Setting a “from” email alias override works independently from the email template override. For example, you can override the “from” email alias and not the template, or vice versa. *Alphanumeric, ten 60-position lines; optional.*
Text to print below items	The standard text to include in each email below the information specific to the order. See the HTML Format Notification Samples and Contents and the Simple Format Notification Sample. *Alphanumeric, three 60-position lines; optional.*

Completing this screen:

- **Create a new template:**
  - Optionally, select the *XML only?* flag to *Outbound Email XML Message (CWEmailOut)* rather than an actual email notification.

    For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
  - Optionally, enter a *From email alias* to use an override email alias at the entity level.
  - Enter the *Text to print above items*.
  - Optionally, enter the *Text to print below items*.
  - Click OK when you are done to save your changes, or click Exit to exit without saving.

- **Change an existing template:**
  - Optionally, change the setting of the *XML only?* flag indicating whether to generate the actual email or the *Outbound Email XML Message (CWEmailOut).*

    For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
  - Optionally, enter a *From email alias* to use an override email alias at the entity level.
  - Optionally, change the *Text to print above items* or the *Text to print below items*, or enter additional text.
  - Click OK when you are done to save your changes, or click Exit to exit without saving.
- **Delete an existing template:**
  - Delete each line of text in the *Text to print above items* and *Text to print below items*.
  - Click OK when you are done to delete the template, or click Exit to exit without deleting.

Entity Email Override by Order Type Screen

Purpose: Use this screen to work with entity/order type email text templates, including the “from” email alias and the *XML only?* settings, for the order, shipment, order cancellation, and order line cancellation notifications.

Overrides other templates: If you set up an email override here, it overrides all other email setup at the entity, order type, or order level. See Email Setup within Order Administration for background on the hierarchies that apply to generating email or the *Outbound Email XML Message (CWEmailOut)*.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

How to display this screen: Select Order Type at the Work with Entity Email Overrides Screen.

> **Note:**
>
> When you first advance to this screen, it does not display any entity/order type email overrides; you need to use the Create option to create each record.

Column sort: You can sort on any column on this screen by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Field	Description
Order type	An order type to generate the email override. Order types are defined in and validated against the Order Type file. See Establishing Order Types (WOTY) for more information. *Alphanumeric, 1 position; display-only.* **Note:** The order type description is not displayed.
Notification type	The type of notification for the override. Possible notification types are: • Order Cancel Confirmation • Order Line Cancel Confirmation • Order Confirmation • Shipment Confirmation You cannot set up overrides for any other notification types at the entity/order type level.

Option	Procedure
Create an entity/order type email override	Select Create to advance to the Create Entity Order Type Template Screen.
Change an entity/order type email override	Select Change for an existing override to advance to the Change Entity Order Type Template Screen.
Display an entity/order type email override	Select Display for an existing override to advance to the Display Entity Email Override Template Screen.
Delete an entity/order type email override.	Select Delete for an existing override to delete it. At the Confirm Delete window, select Yes to delete the record; otherwise, select No.

Create Entity Order Type Template Screen

Purpose: Use this screen to create a new entity/order type email override by entering the template text to use for the order, shipment, order cancellation, or order line cancellation notification. You can also specify the “from” email alias and the *XML only?* settings.

Overrides other templates: If you set up an email override here, it overrides all other email setup at the entity, order type, or order level. See Email Setup within Order Administration for background on the hierarchies that apply to generating email or XML notifications.

How to display this screen: Select Create at the Entity Email Override by Order Type Screen.

Field	Description
Entity	The code for the entity you selected at the Work with Entities Screen. *Number: numeric, 3 positions; display-only.*

Field	Description
Description	A description of the entity. *Description: alphanumeric, 25 positions; display-only.*
Order Type	Select the type of order to receive the notification for orders in the selected entity. Only order types whose *Email notification* flag is selected are available for selection. **Note:** The order type code is not displayed. *Description: alphanumeric, 30 positions; required.*
Notification Type	Select the type of notification you are creating for the entity/order type override. Available notice types are: • Order Cancel Confirmation • Order Line Cancel Confirmation • Order Confirmation • Shipment Confirmation *Required.*
XML Only?	Indicates whether to generate the *Outbound Email XML Message (CWEmailOut)* rather than an actual email notification for notices generated for this order type and entity. This XML message includes additional information that is not included in the standard email notice. You might choose to generate the XML message so that you can use the additional information to produce a reformatted HTML email that includes promotional material. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Valid values are: • Selected = Generate the *Outbound Email XML Message (CWEmailOut)* rather than an actual email • Unselected = Generate the email notification rather than the outbound XML message For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). **Note:** This setting applies only if this is the email text template used to generate the notification, as described under HTML Email or Outbound Email XML Message? See *Outbound Email API* for an overview, and see HTML Email or Outbound Email XML Message? for a discussion of when the system uses this setting as an override at the entity level. For more information, see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Field	Description
From Email Alias	The alias to display with the "from" address for emails, for example, My Email Alias <no-reply@omni.retail.oraclecloud.com>. The actual "from" address is set by Oracle and cannot be changed. The system uses the following hierarchy in selecting the "from" email alias: uses the following hierarchy in selecting the "from" email alias: 1. Order Type/Entity: If a From email alias is specified at the Create Entity Order Type Template Screen or Change Entity Order Type Template Screen, use this alias; otherwise, 2. Entity: If a From email alias is specified here for the email notification type, use this address; otherwise, 3. Company: If a From email alias is specified at the Change Company Screen, use this address; otherwise, 4. Do not use an email alias You can enter an email alias in upper and lower case. See Email Address Validation for information on how the system verifies that your entry is formatted correctly. Default: • Select Dflt Frm Comp to default the email alias defined at the company level. • Select Dflt Frm Ent to default the email alias defined at the entity level. *Alphanumeric, 50 positions; optional.*
Text To Print Above Items	The standard text to include in each email above the information specific to the order; the system allows your entry in upper and lower case. See the HTML Format Notification Samples and Contents and the Simple Format Notification Sample. See Email Text Templates for information on the hierarchy that determines which text template to use. Setting a "from" email alias override works independently from the email template override. For example, you can override the "from" email alias and not the template, or vice versa. *Alphanumeric, ten 60-position lines; optional.*
Text To Print Below Items	The standard text to include in each email below the information specific to the order; the system allows your entry in upper and lower case. See the HTML Format Notification Samples and Contents and the Simple Format Notification Sample. *Alphanumeric, three 60-position lines; optional.*

Completing this screen: To create an email override at the entity/order type level:

1. Select an Order Type.
2. Select a Notification Type.
3. Optionally, select the XML Only? flag to generate the *Outbound Email XML Message (CWEmailOut)* rather than an actual email notification.

   For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1)
4. Optionally, enter a From Email Alias.

5. Optionally, enter the Text To Print Above Items and the Text To Print Below Items.

> **Note:**
>
> When you copy the text from the company-level or entity-level template, it overrides any text currently entered at the entity/order type level. If you then click OK, the system overwrites the previous entity/order type-level text. To restore the text, you need to enter it again.

See the field descriptions above for more information.

Screen Option	Procedure
Default the email alias defined at the company level to the From Email Alias	Select Dflt Frm Comp.
Default the email alias defined at the entity level to the From Email Alias	Select Dflt Frm Ent.

Change Entity Order Type Template Screen

Purpose: Use this screen to change an existing entity/order type notification override that you set up through the Create Entity Order Type Template Screen.

Available options are:

- change the setting of the XML Only? flag
- enter, change, or delete the From Email Alias
- change or delete the Text To Print Above Items or Text To Print Below Items. You can also edit the copied text as needed.

> **Note:**
>
> When you copy the text from the company-level or entity-level template, it overrides any text currently entered at the entity/order type level. If you then click OK, the system overwrites the previous entity/order type-level text. To restore the text, you need to enter it again.

For more information: See the Create Entity Order Type Template Screen for field descriptions.

How to display this screen: Select Change for an existing notification override at the Entity Email Override by Order Type Screen.

Display Entity Email Override Template Screen

Purpose: Use this screen to review an existing entity/order type notification override that you set up through the Create Entity Order Type Template Screen.

You cannot change any information on this screen. See the Create Entity Order Type Template Screen for field descriptions.

How to display this screen: Select Display for an existing template at the Entity Email Override by Order Type Screen.

Working with Divisions (WDIV)

Purpose: You can use the Divisions function to:

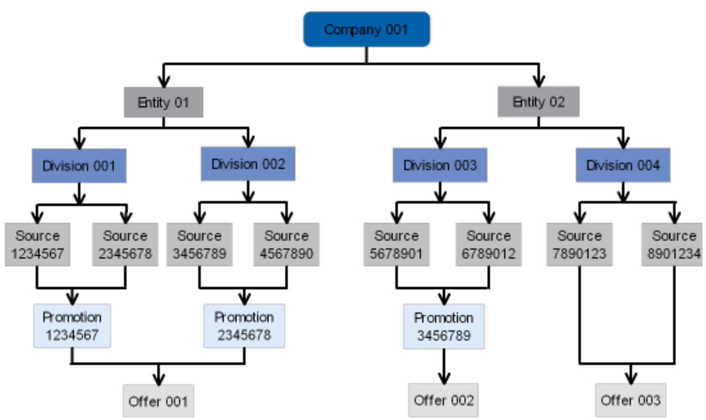
- add or maintain divisions and their descriptions
- assign a division to an entity

Divisions are an important component of the Order Administration sales reporting hierarchy. Divisions can represent groups within business units (for example, winter, spring, summer, fall, and holiday within a business unit called Mail Order). If you are interested in grouping sales within an entity, create divisions. You must create at least one division per entity.

In this topic:

- Work with Divisions Screen
- Create Division Screen
- Display Division History Screen

Example: Within a business unit called Mail Order, you want to keep sales information separate for employees and each of your 5 seasons. Set up 6 divisions: 1 division for employees and 5 divisions to represent each of your seasons.



Work with Divisions Screen

How to display this screen: Enter WDIV in the *Fast Path* field or select Work with Divisions from a menu.

Field	Description
Div (Division)	A code that represents a division. *Alphanumeric, 2 positions; optional.*

Field	Description
Description	The description of the division code. *Alphanumeric, 30 positions; optional.*

Screen Option	Procedure
Create a new division code	Select Create to advance to the Create Division Screen.
Change division information	Select Change for a division to advance to the Change Division screen. At this screen you can change any information except the division code. See Create Division Screen for field descriptions.
Delete a division	Select Delete for a division to delete it.
Display a division	Select Display for a division to advance to the Display Division screen. You cannot change any information on this screen. See Create Division Screen for field descriptions. Select Dsp Div History to advance to the Display Division History Screen.
Review division history	Select History for a division to advance to the Display Division History Screen.
Work with user defined fields	Select User Field for a division to advance to the Work with User Fields Screen

Create Division Screen

Purpose: Use this screen to create a division for an entity in your company.

How to display this screen: At the Work with Divisions Screen, select Create.

Field	Description
Division	A code that represents a division. *Alphanumeric, 2 positions.* *Create screen: required.* *Change screen: display-only.*
Description	The description of the division. *Alphanumeric, 30 positions; required.*
Entity	The entity code to which this division is assigned. Validated against the Entity table; see Working with Entities (WENT). *Numeric, 3 positions; required.*

Field	Description
Bank code	The bank code used by this division. The system uses this bank code when it creates refund records. If you process orders in multiple currencies, each currency is associated with a unique bank; as a result, you must be sure to associate each division with a bank of the correct currency. See Working with Currency (WCUR), for a discussion on how to use the bank code when setting up your company for multi-currency orders. *Alphanumeric, 3 positions; required.*

Display Division History Screen

Purpose: Use this screen to review performance statistics for a division. You cannot change or update any information on this screen.

How to display this screen:

- select History for a division code at the Work with Divisions Screen
- select Display Division History at the Change Division screen or the Display Division screen

Field	Description
Division	A code that represents a division. *Numeric, 2 positions; display-only.*

Field	Description
Sales to date	Number of sales (invoices) for this division. This is a life-to-date figure. If the Consolidated Invoice (B49) system control value is selected, the system creates 1 invoice record for all items on an order that ship on a single day regardless of the number of picks associated with that order. **Note:** An order with multiple recipients (several ship-to addresses) has 1 order number. For an order with multiple recipients, 1 invoice record is created for all packages shipped in a single day. If the *Consolidated Invoice* system control value is unselected, then Order Administration creates an invoice record for every pick on an order that shipped on a single day. **Note:** In Order Management System 21.0 or higher, or Order Administration, you cannot select the Consolidated Invoice system control value if it is not already selected. If the system control value is currently selected (set to Y) and you deselect it (change it to N or blank), you cannot then change it back to selected. The option to consolidate invoices will be removed at a later date. *Numeric, 7 positions; display-only.*
Value sales to date	Dollars in sales for this division. This is a life-to-date figure. *Numeric, 20 positions with a 2-place decimal; display-only.*
Returns to date	Number of returns and/or exchanges for this division. This is a life-to-date figure. *Numeric, 7 positions; display-only.*
Value retrns to date (Value returns to date)	Dollars in returns and/or exchanges for this division. This is a life-to-date figure. *Numeric, 20 positions with a 2-place decimal; display-only.*
Sales today	Number of sales (invoices) for this division since the last time you ran Daily Periodic Processing. *Numeric, 7 positions; display-only.*

Field	Description
Value sales today	Dollars in sales for this division since the last time you ran Daily Periodic Processing. *Numeric, 20 positions with a 2-place decimal; display-only.*
Returns today	Number of returns and/or exchanges for this division since the last time you ran Daily Periodic Processing. *Numeric, 7 positions; display-only.*
Value retrns today (Value returns today)	Dollars in returns and/or exchanges for this division since the last time you ran Daily Periodic Processing. *Numeric, 20 positions with a 2-place decimal; display-only*.
Year	Year in which the sales period occurs. *Numeric, 2 positions, optional.*
Period	The sales period within a specified year. *Numeric, 2 positions, optional.*
Sales	Number of sales (invoices) for this division for the year and period displayed. *Numeric, 7 positions; display-only.*
Value sales	Monetary value in sales for this division for the year and period displayed. *Numeric, 20 positions with a 2-place decimal; display-only.*
Returns	Number of returns and/or exchanges for this division for the year and period displayed. *Numeric, 7 positions; display-only.*
Value retrns (Value returns)	Monetary value in returns and/or exchanges for this division for the year and period displayed. *Numeric, 20 positions with a 2-place decimal; display-only.*

Working with Pay Types (WPAY)

Working with Pay Types (WPAY)

Purpose: Use this option to perform the following for stored value card (gift card) or cash/check payment methods:

- add or maintain these payment methods and their descriptions
- specify an alternate refund pay type if your company allows you to change the method by which you refund the customer
- indicate the minimum dollar value and the maximum dollar amounts for which your company will produce a refund
- specify the characteristics of credit cards that your company accepts as a method of payment including the limits, if any, for reauthorizing a credit card order and the authorization and deposit services
- specify the financial conditions under which an order will go on hold (for example, dollar amount limits, balance due)
- specify the cross-reference for a ChannelAdvisor marketplace, so that orders originating in that marketplace are assigned the matching payment method, and specify whether to calculate tax and shipping at the item level or the order level.

Card number layout: You can also use this option define the format for displaying card numbers on screens and reports in Order Administration.

> **Note:**
>
> You cannot use the Work with Pay Types option for creating or changing credit card or wallet pay types; instead, you need to use the Payment Configurations options in Modern View. See the Modern View online help for more information. However, you can display existing credit card or wallet types.

Pay type versus pay category: A pay type defines a specific method of payment such as check, cash, Visa, Mastercard, American Express, etc. Each pay type is assigned to a pay category.

Valid pay categories are:

- Cash/Check
- Credit Card (used for stored value cards)

Charging against pay types: When billing each pay type on a multi-paytype order, the system automatically assigns charge sequences to different payment categories as follows:

Payment Method	Pay Category	Default Charge Sequence
Cash or check	Cash/Check	**1**
Stored value card	Credit Card	**2**
Credit card (any Card type besides a stored value card)	Credit Card	**3**

In addition, the system assigns the charge sequence for the “catch-all” payment method the highest charge sequence. For example, if the charge sequence for a check is 10, the system updates the charge sequence for the credit card on the order to 11 (provided the credit card is the “catch-all”).

In this topic:

- Work with Pay Types Screen
- Create Pay Type Screen
- Credit Card Number Format
  - Which Cards are Eligible for Credit Card Number Formatting?
  - Setting Up a Credit Card Number Format
  - Creating a Default Credit Card Number Format
  - Credit Card Number Format Examples
  - Credit Card Number Layout Screen

Work with Pay Types Screen

How to display this screen: Enter WPAY in the *Fast path* field at the top of any menu or select Work with Pay Types from a menu.

Field	Description
Type	A code that represents the pay type. *Numeric, 2 positions; optional.*
Description	The description of the pay type. *Alphanumeric, 30 positions; optional.*
Category	A code for a category of pay type. Valid values: • **Cash/Check** • **Credit Card** (including stored value card and debit card) *Optional.*

Screen Option	Procedure
Create a pay type code	Select Create to advance to the Create Pay Type Screen. You can create only cash/check or stored value card pay types through this screen. Use the Payment Configurations option in Modern View to create credit card, debit card, or wallet pay types.
Change pay type information	Select Change for a pay type to advance to the Change Pay Type screen. At this screen you can change any information except the pay type code. See the Create Pay Type Screen for field descriptions. You can change only cash/check or stored value card pay types through this screen. Use the Payment Configurations option in Modern View to change credit card, debit card, or wallet pay types.
Delete pay type information	Select Delete for a pay type to delete it. You can delete only cash/check or stored value card pay types through this screen. Use the Payment Configurations option in Modern View to delete credit card, debit card, or wallet pay types.
Display pay type information	Select Display for a pay type to advance to the Display Pay Type screen. You can display any pay type; however, you cannot update any information on this screen. See Create Pay Type Screen for field descriptions.
Work with credit card number format	Select Card Number Format for a Credit Card pay category pay type to advance to the Credit Card Number Format. An error message indicates if the pay type is not a Credit Card pay category pay type: `Not available for this pay type.`
Work with user defined fields	Select User Field for a pay type to advance to the Work with User Fields Screen.

Create Pay Type Screen

Purpose: Use this screen to create a cash/check or stored value card (gift card) pay type code.

How to display this screen: At the Work with Pay Types Screen, select Create.

Field	Description
Pay type	A code that represents a pay type, such as a check, credit card, or stored value card. *Numeric, 2 positions.* *Create screen: required.* *Change screen: display-only.*
Desc (Description)	The description of the pay type. *Alphanumeric, 30 positions; required.*
Category	The category of the pay type. Valid values are: • **Cash/Check** • **Credit Card** (stored value card) *Required.*
Alt refund type (Alternate refund type)	The pay type to use for refunds to this pay type. Complete this field only if the pay type for refunds is different from the pay type used on the order. The system checks the appropriate values defined for the alternate refund pay type, not the original pay type, when generating refunds. The alternate refund type must be a pay category of Cash/ Check or Stored Value Card for *Card type* Stored Value. The system displays an error message if you enter an invalid alternate refund type: `Only SVC pay type OR alt pay category of Cash/Check allowed.` *Numeric, 2 positions; optional.*
Alt refund category (Alternate refund category)	The pay category to which the system-generated refund can be charged during refund maintenance. Valid values are: • **Cash/Check** • **Credit Card** (stored value card) When you define an alternate refund category for a pay type, you give yourself the option of changing the refund to the type that corresponds to this category. The alternate refund category must be a pay category of Cash/Check. *Optional.*
Authorization service	A code for the service bureau that authorizes or declines credit card charges. *Alphanumeric, 3 positions; optional.*

Field	Description
Credit card length	The required length of the stored value card number. You can require any length up to 20 positions. **Note:** The system does not validate the credit card length if you enter a 0 in this field. *Numeric, 2 positions; optional.*
Deposit service	A code for the service bureau that performs stored value card deposits for this pay type. *Alphanumeric, 3 positions; optional.*
Leading digits	The first digits numbers of a valid stored value card number. You can enter up to 4 leading digits. *Numeric, 4 positions; optional.*
Reauthorization days	The number of days before a stored value card authorization expires. **Note:** If online authorization is enabled, you should specify this number of days for a payment method in order to prevent repeated, unnecessary authorization requests. If this field is blank for a stored value card pay type, the authorization expires immediately. Also, if the order is submitted to Order Orchestration for fulfillment, there will be unsuccessful authorization attempts. The REAUTH periodic function uses this date to determine when to attempt to reauthorize an expired authorization. Only pay types that have this field set to a number greater than 0 are eligible for reauthorization attempts. *Numeric, 3 positions; optional.*

Field	Description
Modulus check	This setting indicates if the system performs a calculation against the digits of the stored card number to ensure that the card is valid. Valid values are: • Modulus 10 = for a modulus 10 check • Modulus 11 = for a modulus 11 check • Modulus User Defined = for a user-defined modulus check • blank = no modulus check is performed If you enter MU in this field, the system uses the program name from the User Defined Modulus Check Program (E94) system control value. An error message indicates if a program name has not been defined: `Modulus check program has not been specified for SCV E94.` **Note:** The system cannot perform a modulus check against the number if the number includes spaces; for example: 4111 1111 1111 1111. To perform a modulus check, you must enter the number without any spaces between the numbers; for example: 4111111111111111. *Optional.*

Field	Description
Require start date	Indicates whether to require a start date when the customer uses this stored value card pay type. For example, you might use a start date for a stored value card to indicate the first date when the card is effective. If a start date is required but not entered, the system displays an error message in order entry or maintenance: `Credit card start date (0) is not valid.` The start date is a four-position date in MMYY format, similar to the expiration date. Select this flag if you want to require a start date for this pay type. This is a valid selection only if the pay type is a stored value card. Do not select this field if you do not want to require a start date for the pay type. **Note:** • Even if you require a start date for a pay type, the system does not validate the card based on whether the start date is before or after the current date. Typically, if your authorization service requires a start date for this pay type, the service would validate the start date provided against the current date. • If you require the start date for a stored value card, you will not be able to enter the start date at the recap screen in order entry. Instead, you should advance to the Enter Payment Method screen, where all pay type fields are available for entry.
Card type	Indicates the type of card — Credit Card, Debit Card, Stored Value or Wallet. See Stored Value Card Overview and Setup). You cannot enter a card type for a cash/check pay type. You can define a card number format to specify how the credit card number should display on Order Administration screens and reports for all card types; see Credit Card Number Format for instructions. *Required for stored value card pay types.*

Field	Description
Require expiration date	Indicates whether to require an expiration date when the customer uses this stored value card pay type. If an expiration date is required but not entered, the system displays an error message in order entry or maintenance: `Credit card expiration date (0) is not valid.` The expiration date is a four-position date in MMYY format. • Select this flag if you want to require an expiration date for this stored value card pay type. • Leave this field blank if you do not want to require an expiration date for the pay type.
Send reversal	Defines whether the REVERSE Send Reversals for Expired Authorizations (program name PFR0133) periodic function processes all open Authorization History records for this pay type that are eligible for authorization reversal. • Selected = The REVERSE periodic function processes all open Authorization History records for this pay type that are eligible for authorization reversal. • Unselected = The REVERSE periodic function does not process open Authorization History records for this pay type. See the REVERSE Send Reversals for Expired Authorizations periodic function for processing information. **Note:** This setting does not affect Stored Value Card Reversal with the External Payment Service.

Field	Description
Require issue #	Indicates whether to require an issue number when the customer uses this credit card pay type. Some banks assign an incremental issue number when they replace a card because it is lost or stolen. Select this flag if you want to require an issue number for this pay type. This is a valid selection only if the pay type is a credit card. Do not select this flag if you do not want to require an issue number for the pay type. If an issue number is required but not entered in order entry or order maintenance, the system displays an error message: `Credit card issue# () is not valid.` **Note:** • Debit cards might require a start date, an issue number, both, or neither. Even if a start date or an issue date are not required, you can still enter this information in order entry if it is available. • If you require the issue number for any credit card type besides a debit card, you will not be able to enter the issue number at the recap screen in order entry. Instead, you should advance to the Enter Payment Method screen, where all pay type fields are available for entry. However, if the pay type is a debit card, the system displays a pop-up window from the order recap screen for you to enter additional information such as the issue number and start date, regardless of whether the issue number or start date are required.

Field	Description
Notify of installments	CyberSource: Indicates whether to send a `commerceIndicator` set to `install` in the subsequent authorization and deposit request to CyberSource for an order using a deferred or installment pay plan, or to have the information passed in the `ccAuthService` element similar to other subsequent authorizations, such as a split shipment. **Important:** To determine how to set this flag if you offer deferred or installment billing and use CyberSource, you need to confirm the information that the end processor requires for deferred or installment payment plans for each payment type. Possible settings are: • Selected = The `commerceIndicator` is set to `install` in the authorization and deposit request, and no `subsequentAuthReason`, `subsequentAuthStoredCredential`, or `subsequentAuthOriginalAmount` is passed. • Unselected (default) = The authorization and deposit request includes the `commerceIndicator` set to either `moto` or `internet`, based on where the order originated, and also includes the `subsequentAuthReason`, `subsequentAuthStoredCredential`, and `subsequentAuthOriginalAmount`, similar to the request for a split shipment. External Payment Service: Indicates whether to send a `subsequentAuthReason` of INSTALLMENT in the subsequent authorization request for an order using a deferred or installment pay plan. For External Payment Service: • Selected = The `subsequentAuthReason` is set to `INSTALLMENT` in the authorization request. • Unselected (default) = The `subsequentAuthReason` is set to either `REAUTH`, similar to the request for a split shipment. **For more information:** See: • Subsequent Authorization Requests to CyberSource • Subsequent Authorization Requests through the External Payment Service • Deferred/Installment Billing Overview **Note:** You need to verify that the end processor supports the selected option.

Field	Description
Bal due $ limit (Balance due dollar limit)	If a customer short pays an order by an amount equal to or greater than this amount, the system places the order automatically on BD (Balance Due) hold. **Note:** Orders are evaluated for Bal due $ limit (Balance due dollar limit) and Bal due % limit (Balance due percentage limit). *Balance due % limit* takes precedence over *balance due $ limit*, so the system puts the order on hold when it is underpaid by the percentage even if it not underpaid by the dollar amount. When you apply a cash/check payment method: • If there is a *Bal due % limit* specified, and the order is underpaid by this percentage, put the order on hold; otherwise, • If there is a *Bal due $ limit* specified, and the order is underpaid by this amount, put the order on hold; otherwise, • Do not put the order on hold for an underpayment. Example: A customer underpays a $1,250.00 order by $25.00. The *Balance due $ limit* is $5.00; however, the *Balance due % limit* is 5%. Five percent of this order is $62.50. This order will not go on hold. The customer has underpaid by more than the *Balance due $ limit* but less than the *Balance due % limit*. **Note:** If the underpaid amount is less than the amount specified here (and there is no *Bal due % limit* specified), the order does not go on hold. The system creates a balance due record (negative refund record) and puts this record into a write-off pending status. These refund write-off amounts accumulate for the sold-to customer, and can be applied to a subsequent order as an additional charge. The Default

Field	Description
	Additional Charge Code (C45) to be used in these instances is specified in the System Control table. *Numeric, 13 positions with a 2-place decimal; optional.*
Order $ limit (Order dollar limit)	If the order total meets or exceeds this dollar amount, the system places the order on dollar hold, regardless of the pay category (cash/check or credit card). **Multi-pay orders:** If there is more than one payment method on the order, the system places the order on hold if the order total meets or exceeds the *Order $ limit* for any pay type. Example: The order total is $200.00, and the customer sends a $50.00 check and puts the balance on a credit card. The *Order $ limit* for the check pay type is $150.00, and the *Order $ limit* for the credit card is $250.00. The system places the order on hold, because the order total of $200.00 meets or exceeds the *Order $ limit* of $150.00 for the check pay type (even though the check payment amount is less than the *Order $ limit*). **Cash/check orders:** The system evaluates both *Order $ limit* and Hold days. *Order $ limit* takes priority over *Hold days*. Example: The order total is $350.00 and the customer pays by check. *Order $ limit* is $225.00; *Hold days* is 5. Six days pass; this order will still be on hold. This customer order meets the value specified in *Hold days* but still exceeds the *Order $ limit* specified in this table. The system does not check this setting if: • the order is already on *any type* of system hold • an authorization service has been defined for this payment type; instead, the system places the order payment method automatically on CW (credit wait) hold *Numeric, 13 positions with a 2-place decimal; optional.*
Bal due % limit (Balance due percentage limit)	If a customer underpays on an order by a percentage equal to or greater than this amount, the system places the order on hold. **Note:** Orders are evaluated for both Bal due $ limit (Balance due dollar limit) and *Balance due % limit*. *Balance due % limit* takes priority over *balance due $ limit*. See the Bal due $ limit (Balance due dollar limit) for a discussion. *Numeric, 13 positions with a 2-place decimal; optional.*

Field	Description
Hold days	The number of days to hold an order while waiting for a check to clear the bank. The system releases the order from hold automatically through Daily Periodic Processing once the number specified here has passed. **Note:** Cash/check orders are evaluated for both Order $ limit (Order dollar limit) and Hold days. *Order $ limit* takes priority over *Hold days*. *Numeric, 3 positions; optional.*
Ref chk min (Refund check minimum)	The minimum dollar amount for which you issue a refund. Refunds less than this amount are put in a write-off pending status. These write-off amounts accumulate in the Customer Sold-to table and can be used as an order credit on a subsequent order. The Default Cash Pay Type (C07) to be used in these instances is indicated in the System Control table. If a pay type has an alternate refund type, the system checks the refund check minimum for the alternate refund type. *Numeric, 13 positions with a 2-place decimal; optional.*
Ref chk max (Refund check maximum)	The maximum dollar amount for automatic refund creation. Any refund exceeding this dollar amount is put on hold. For example, if you leave this field blank for a credit card alternate refund type, all refunds will go on hold because they exceed the blank (zero) amount. If a pay type has an alternate refund type, the system checks the refund check minimum for the alternate refund type. *Numeric, 13 positions with a 2-place decimal; optional.*
Release days	The number of days to hold a refund from processing. The system changes the status of the refund to “open” when you process the refund if the release days have passed. This feature ensures that the customer's check for the order clears before you print a refund check for the overpayment. If a pay type has an alternate refund type, the system checks the refund check minimum for the alternate refund type. *Numeric, 3 positions; optional.*
Store tender	A cross-reference to the corresponding tender code in a point-of-sale system. This field is available only if you specify a Default Location for ORCE Integration (K69). This code is passed in the POSLog integration to Customer Engagement as the tender ID, which can be used as a loyalty qualifier. *Alphanumeric, 4 positions; optional.*

Field	Description
CA cross reference #	A cross-reference to a ChannelAdvisor marketplace, set up through Work with ChannelAdvisor Offers Screen, from which you receive orders: • If the CAORDUP periodic function creates an order from ChannelAdvisor, and the `ItemSaleSource` passed for the order matches this cross-reference, the periodic function assigns this payment method to the order. Your marketplace needs to match a ChannelAdvisor Site Token value. • If an order has a payment method whose cross-reference matches a ChannelAdvisor marketplace and also matches the ChannelAdvisor Order Type (L90), the Processing Refunds (MREF) option submits any pending refunds for the order to ChannelAdvisor, and does not actually generate the refund. If more than one pay type has the same matching cross-reference, the periodic function selects the pay type with the highest pay type code. **Cash/check category:** If a *CA cross reference #* is specified, the pay type Category must be Cash/Check. See ChannelAdvisor Integration Overview and ChannelAdvisor Setup. This field is available only if the ChannelAdvisor Order Type (L90) system control value specifies an order type. If you enter a value in this field, then the CA type field is required. *Alphanumeric, 40 positions; optional.*
CA type	Controls how the CAORDUP periodic function calculates shipping and tax, and how refund amounts are passed when Submitting Refunds for ChannelAdvisor Orders. If this field is set to: • Item Level or blank = Consistent with the Amazon and eBay with premium tax marketplaces: – the CAORDUP periodic function calculates shipping and tax based on the amounts in the OrderLineItemItem element – refund processing calculates tax and shipping at the item level and passes these amounts in the RefundItem level in the SubmitOrderRefund message • Order Level = Consistent with the eBay marketplace (without premium tax): – the CAORDUP periodic function uses the tax and shipping amounts from the OrderLineItemInvoice element and prorates them across the lines on the order – the SubmitOrderRefund message specifies amounts at the order level This field is available only if the ChannelAdvisor Order Type (L90) system control value specifies an order type. If a CA cross reference # is specified for the pay type, then this field is required.

Credit Card Number Format

Card number formats allow you to specify which digits of a credit card number are masked on Order Administration screens and reports using a special character, such as an asterisk (*). For example, you may wish to mask all but the last 4 digits of a 16-digit credit card number: ************1111.

Data security: You should set up a masking format for all credit cards. See *Guidelines for Data Security* in the Security document for a checklist of recommended data security settings.

Tokenization: If you use credit card tokenization, the number that is masked is a token, rather than the actual credit card number.

Defining a format: You can use the Card Number Layout Screen to define which digits of the credit card number on Order Administration screens and reports are masked. You can define a separate credit card number format for each Credit Card pay category pay type and also define a default format to use for those Credit Card pay category pay types that do not have a card number format defined.

When a card number displays on a screen or report, the system looks at the pay type associated with the card number to determine which digits of the card number are masked. If the system cannot determine the pay type associated with the card number, the card number displays in the default card number format.

Which Cards are Eligible for Card Number Formatting?

Eligible cards: You can define a card number format for the following types of Credit Card pay category pay types:

- Credit card (*Card type* Credit)
- Debit (Switch) card (*Card type* Debit)
- Stored value card (*Card type* Stored Value)

Ineligible cards: You receive the error message `Not available for this pay type` if you try to define a card number format for any non-pay category Credit Card pay type.

Card number scan screens: You can scan on credit card number at the following Order Administration screens:

- Order Maintenance Selection Screen
- Order Inquiry Scan Screen
- Select Orders For Return Authorization Screen

However, if you have defined a card number format, the credit card numbers that display on the bottom half of the scan screen will be masked by the associated card number format.

In addition, if you have credit card encryption enabled, the system will not find a credit card number match unless you enter the full credit card number in the scan field. The credit card number you entered in the scan field is display-only at the top of the screen and the credit cards that display at the bottom of the screen are masked by the associated card number format.

> **Note:**
>
> If you use credit card tokenization, you will not be able to scan on the full credit card number on these screens since the credit card number has been replaced with a token. Instead, you can scan on the last four digits of the credit card number on these screens; the system advances you to the Scan By CC Last 4 screen, where you can review orders that contain a credit card payment whose *CC Last 4* field in the Order Payment Method table matches the last four digits of the credit card number that you entered in the scan field.

Setting Up a Credit Card Number Format

Use the Unformatted card number positions field on the Card Number Layout Screen as a layout of the number of positions in the *Credit card number* field. There are 20 positions available in a credit card number that you can select to display or mask with a special character.

> **Note:**
>
> Even if a credit card number only includes 16 digits, you will still be required to enter a value in positions 17-20 of the card number format. Enter `17, 18, 19`, and `20` in the respective fields if you do not want a special character to display.

To create or change:

1. At the Work with Pay Types Screen, select Card Number Format for a Credit Card pay category pay type to advance to the Card Number Layout Screen.
2. In the Formatted card number positions fields, decide which digits of the credit card number you wish to display and enter the digit number in the appropriate field. For example, if you wish to display the last 4 digits of a 16-digit card number, enter 13 in field 13, 14 in field 14, 15 in field 15, and 16 in field 16.
3. In the Formatted card number positions fields, decide which digits of the credit card number you wish to mask and enter a special character in the appropriate field. You can enter any special character, such as an asterisk (*) or a number sign (#) as well as any letter, such as C. However, you cannot use a number to mask a credit card number. For example, if you wish to mask all but the last 4 digits of a 16 digit credit card number using an asterisk, enter * in fields 1-12 and enter 13, 14, 15, and 16 in the respective fields.

> **Note:**
>
> You cannot mask the digits of a credit card number using a number. If you enter a number between 1 - 20 in any of the Formatted card number positions fields, the system will display that digit of the credit card number in the position specified. For example, if you enter 9 in field 1, the system will display the 9th digit of the credit card number in position 1 and not the number 9. You will receive an error if you enter a number greater than 20: `Only one character or number 1-20 allowed per position.`

4. Select OK to validate your entries. You must enter a number between 1 and 20 or a special character in each of the *Formatted card number positions* fields.

To delete: To delete a card number format, clear the data in all of the *Formatted card number positions* fields and select OK.

If you delete a card number format, but still have a default credit card number format defined, the card number will display in the default format on Order Administration screens and reports.

Creating a Default Card Number Format

If you wish to assign most of your Credit Card pay category pay types to the same card number format, you can create the format and select the Set as default format field. Any Credit Card pay category pay type that does not have a card number format defined, will use the default card number format.

You can create only 1 default card number format. If you flag a card number format as the default and then create a new card number format and flag it also as the default, the system advances you to the Override Default window, where you must confirm that you wish to change the default card number format.

Select Accept to change the default card number format; otherwise, select Exit to keep the current default card number format.

If you wish to create a default card number format, but still display the entire card number for one of your Credit Card pay category pay types, create a card number format for that pay type and enter all of the card digits in the Formatted card number positions fields: `1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20`. The system will display the entire card number on Order Administration screens and reports.

If you do not define a default card number format, and a format has not been defined for a Credit Card pay category pay type, the system displays the full card number for that pay type on Order Administration screens and reports.

Card Number Format Examples

The table below displays examples of card number formats.

Card Format	Formatted card number positions fields	Card Display
Mask the card number using the number sign.	# # # # # # # # # # # # # # # # # # # #	If the number is 4111111111111111, it displays as: ####################

Card Format	Formatted card number positions fields	Card Display
Display the full card number.	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 **Note:** You may wish to define this format if you have also defined a default card number format and you w	If the number is 4111111111111111, it displays as: 4111111111111111.

Card Format	Formatted card number positions fields	Card Display
	ant to display the full card number for this pay type. For example, you may wish to display all stored value card nu	

Card Format	Formatted card number positions fields	Card Display
	m be rs.	
Only display the last 4 digits of a 16-digit credit card number. For all other digits, display an asterisk.	* * * * * * * * * * * * 13 14 15 16 17 18 19 20	If the number is 4111111111111111, it displays as: ************1111
Display all but the last 4 digits of a 16-digit card number. For all other digits, display an asterisk.	1 2 3 4 5 6 7 8 9 10 11 12 * * * * 17 18 19 20	If the number is 4111111111111111, it displays as: 411111111111****
Only display the first 4 digits and the last 4 digits of a 16-digit card number. For all other digits, display an asterisk.	1 2 3 4 * * * * * * * * 13 14 15 16 17 18 19 20	If the number is 4111111111111111, it displays as: 4111********1111
Display all of the digits in a 16-digit card number, but display the first 4 digits in the last 4 positions and the last 4 digits in the first 4 positions.	13 14 15 16 5 6 7 8 9 10 11 12 1 2 3 4 17 18 19 20	If the number is 4788250000121443, it displays as: 1111111111114111

Card Number Layout Screen

Use this screen to create a card number format; see Card Number Format for an overview and setup instructions.

How to display this screen: Select Card Number Format for a Credit Card pay category pay type at the Work with Pay Types Screen.

Field	Description
Pay type	The code and description of the credit card pay type assigned to the card number layout. *Pay type code: Numeric, 2 positions; display-only.* *Description: Alphanumeric, 30 positions; display-only.*

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Set as default format</td><td>Indicates if you wish to set this card number format as the default format. Any Credit Card pay category pay type that does not have a card number format defined, will use this format.
Selected = This card number format is the default format to use if a format has not been defined for a Credit Card pay category pay type.
Unselected (default) = This card number format is not the default format and is only used to display card numbers for this pay type.
If you select this flag and a default card number format already exists, the system advances you to the Override Default Window, where you can confirm that you wish to change the default card number format.

Note:
If you do not define a default card number format, and a format has not been defined for a Credit Card pay category pay type, the system displays the full card number for that pay type on Order Administration screens and reports.

See Creating a Default Card Number Format.</td></tr>
<tr><td>Unformatted credit card number positions</td><td>Displays the number of positions available to format in a card number. Use this field as a reference when creating the card number format in the Formatted credit card number positions field.
Alphanumeric, 20 positions; display-only.</td></tr>
</table>

Field	Description
Formatted card number positions	The position and format of each of the card digits to display on Order Administration screens and reports. For example, to display only the last 4 digits of a 16 digit card number, enter a special character, such as an asterisk (*) in fields 1 - 12. Enter the digit number in fields 13 - 20. `* * * * * * * * * * * * 13 14 15 16 17 18 19 20` If the card number is 4111111111111111, the system displays `************1111` as the card number on `Order Administration` screens and reports. **Note:** You must enter either a digit number (1-20) or a single position special character in each field or an error message displays: `Only one character or number 1-20 allowed per position.` See Setting Up a Card Number Format for setup instructions and examples. *Numeric, 20 positions; required.*

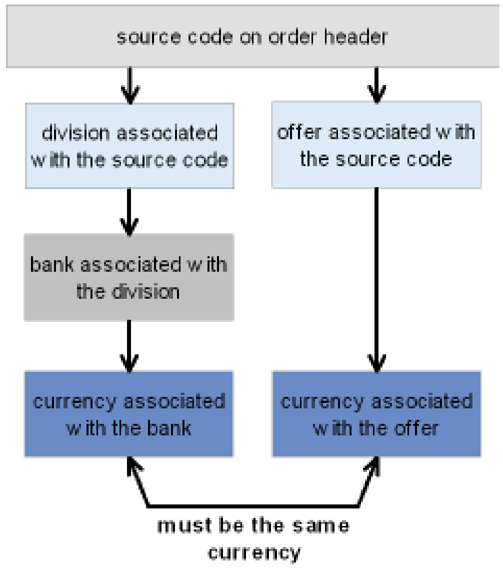
Working with Banks (WBNK)

Purpose: Use the Banks function to:

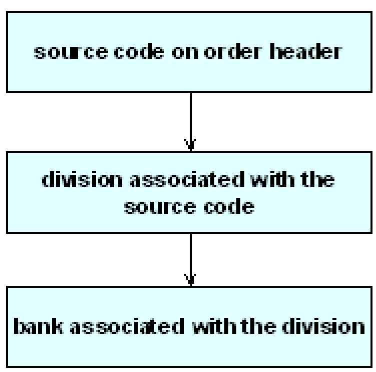
- add or maintain bank codes and their descriptions
- indicate the transit number associated with the bank
- define the currency for the bank, if you process orders in multiple currencies
- define the inbound and outbound reconciliation programs, if you send and receive refund check information to and from a bank

If using multiple currencies by offer: The bank code is key to your setup if you process orders in multiple currencies. The system determines that you intend to process orders in multiple currencies if the Multi Currency by Offer (E03) system control value is selected.

When processing orders in multiple currencies, you must create a separate bank for each currency you intend to use, including your local currency.



Processing refunds: Each time you create a refund record, the system associates the refund with the appropriate bank.



For more information:

- working with currency codes: Working with Currency (WCUR)
- working with refunds: Working with Refunds, Writeoffs and Balances Due (WREF)
- Multi Currency by Offer (E03) system control value

In this topic:

- Work with Banks Screen
- Create Bank Screen

Work with Banks Screen

How to display this screen: Enter WBNK in the *Fast Path* field at the top of any menu or select Work with Banks from a menu.

Field	Description
Bank	A code that represents the bank. *Alphanumeric, 3 positions; optional.*
Description	The description of the bank code. *Alphanumeric, 30 positions; optional.*
Transit#	The transit number, provided by the bank. *Numeric, 25 positions; optional.*

Screen Option	Procedure
Create bank codes	Select Create to advance to the Create Bank Screen.
Change bank information	Select Change for a bank to advance to the Change Bank screen. At this screen you can change any information except the bank code. See Create Bank Screen for field descriptions.
Delete a bank	Select Delete for a bank to delete it.
Display bank information	Select Display for a bank to advance to the Display Bank screen. You cannot update any information on this screen. See Create Bank Screen for field descriptions.

Create Bank Screen

Purpose: Use this screen to create a bank.

How to display this screen: At the Work with Banks Screen, select Create.

Field	Description
Bank #	A code that represents the bank. *Numeric, 3 positions.* *Create screen: required.* *Change screen: display-only.*
Description	The description of the bank code. This is commonly the name of the bank. *Alphanumeric, 30 positions; required.*
Transit #	The transit number, provided by the bank. *Numeric, 25 positions; required.*
Account #	Your account number with the bank. *Numeric, 12 positions; optional.*
Last check #	The last refund check number printed. When you process refund checks for this bank, the system suggests the next sequential number after the value here. When refund check generation is complete, the system updates this field with the last number used. *Numeric, 9 positions; required.*
Phone number	The phone number for the bank. *Numeric, 14 positions; optional.*

Field	Description
Currency code	The code representing the currency to be processed by this bank. This field displays only if the Multi Currency by Offer (E03) system control value is selected. See Working with Currency (WCUR). *Alphanumeric, 3 positions; required if using multiple currencies.*
Country	The code representing the country where the bank is located. The bank code from the Default Country for Customer Address (B17) system control value defaults. *Alphanumeric, 3 positions; optional.*

Working with Accounting Periods (WACP)

Purpose: Use the Accounting Periods function to define your fiscal calendar. Specifically, use this function to:

- add or maintain accounting periods and their descriptions
- assign accounting periods to a year
- indicate the start date and end date of the period

Transactions post to the accounting period in which they occur, even if your accounting department has not closed the previous accounting period.

In this topic:

- Work with Accounting Periods Screen
- Create/Change/Display Accounting Period Screen
  - Changing Accounting Periods
  - Displaying Accounting Periods

Work with Accounting Periods Screen

How to display this screen: Select Work with Accounting Periods from a menu or enter WACP in the *Fast Path* field at the top of any menu.

Field	Description
Year	Year when the accounting period occurs. *Numeric, 2 positions (YY); optional.*
Period	A 2-position code that represents the accounting period. *Alphanumeric, 30 positions; optional.*
Desc (Description)	The description of the accounting period. *Alphanumeric, 3 positions; optional.*
Start	The date when the accounting period begins. *Numeric, 6 positions (in user date format); optional.*
End	The date when the accounting period ends. *Numeric, 6 positions (in user date format); optional.*

> **Note:**
>
> The options on this screen function somewhat differently from other screens. See the table below for details.

Screen Option	Procedure
Create an accounting period	Select Create to advance to the Create/Change/Display Accounting Period Screen in create mode.
Change accounting period information	Select Change from the *Action* column on the left to advance to the Create/Change/Display Accounting Period Screen in change mode.
Delete an accounting period	Select Delete from the *Action* column on the left to delete an accounting period.
Display an accounting period	Select Display from the *Action* column on the left to advance to the Create/Change/Display Accounting Period Screen in display mode.

Create/Change/Display Accounting Period Screen

Purpose: Use this screen to create, change, or display an accounting period.

How to display this screen: Select Create at the Work with Accounting Periods Screen, or select Change or Display from the *Action* column on the left. See Changing Accounting Periods and Displaying Accounting Periods for information on available options in change and display modes.

Field	Description
Year	The year when the accounting period occurs. *Numeric, 2 positions (YY).* *Create mode: required.* *Change mode: display-only.*
Period	A 2-position code that represents the accounting period. *Numeric, 2 positions.* *Create mode: required.* *Change mode: display-only.*
Description	The description of the accounting period (e.g., JAN, FEB, Q1, Q2). *Alphanumeric, 3 positions; required.*
Start date	The date the accounting period begins. *Numeric, 6 positions (in user date format); required.*
End date	The date the accounting period ends. *Numeric, 6 positions (in user date format); required.*

Changing Accounting Periods

To change: Select Change for an accounting period from the *Action* column on the left at the Work with Accounting Periods Screen to advance to the Create/Change/Display Accounting Period screen in change mode. You cannot change the year or period fields.

Displaying Accounting Periods

To display: Select Display for an accounting period from the *Action* column on the left at the Work with Accounting Periods Screen to advance to the Create/Change/Display Accounting Period screen in display mode. You cannot update any information.

Working with Currency (WCUR)

Purpose: Use the Currency table to define currencies and their conversion rates.

The system uses this information when:

- you create purchase orders, to convert your currency rate to your vendor's currency rate
- you receive against a purchase order, to convert your vendor's currency rate to your currency rate
- you bill orders, if the Customer Sold To on the order is from a foreign country
- you enter orders, bill orders, or process refunds, if you track multi-currency by offer

> **Note:**
>
> If you track currency conversion rates at the time of order billing in the Invoice Currency table, you must use the same code to identify a country and its currency. You must also have the Track Invoice Currency (D68) field in the System Control table selected. See Setting Up the Country Table (WCTY) for more information on country codes.

Multiple Currencies by Offer: You can accept orders in various currencies by defining the currency to be used for each offer. You must set the Multi Currency by Offer (E03) system control value to Y. Setting up multiple currencies by offer enables you to take orders in a foreign currency, but track demand in your local currency.

Default decimal separator and thousand separator for currency: The system uses the following values to determine the default decimal separator and thousand separator of Order Management System.

- The DECIMAL_SEPARATOR property defines the character used to indicate the decimal place in a number.
- The THOUSAND_SEPARATOR property defines the character used to separate groups of thousands.

The supported thousand and decimal separators are displayed below.

Default Thousand Separator	Default Decimal Separator	Results
, (comma)	. (period)	4,294,967,295.00
. (period)	, (comma)	4.294.967.295,00

See Regional Settings for an overview and see Setting the Default Decimal and Thousand Separator Formats for more information on how numbers display in different areas of the application.

In this topic:

- Work with Currency Screen
- Create Currency Screen

Work with Currency Screen

How to display this screen: Enter WCUR in the *Fast path* field at the top of any menu or select Work with Currency from a menu.

Field	Description
Code	A code that represents the currency. *Alphanumeric, 3 positions; optional.*
Description	The description of the currency code. *Alphanumeric, 30 positions; optional.*
Last update	The date that a conversion rate was most recently updated. *Numeric, 6 positions; optional.*
Conversion rate	The rate at which this currency is converted to the local currency. Should be set to 1.00 for the Local Currency Code (A55). *Numeric, 13 positions with a 7-place decimal; display-only.*

Screen Option	Procedure
Create currency codes	Select Create to advance to the Create Currency Screen.
Change currency information	Select Change for a currency code to advance to the Change Currency screen. At this screen you can change any information except the currency code. See Create Currency Screen for field descriptions.
Delete currency information	Select Delete for a currency code to delete it.
Display currency information	Select Display for a currency code to advance to the Display Currency screen. You cannot update any information on this screen. See Create Currency Screen for field descriptions.

Create Currency Screen

Purpose: Use this screen to create a currency code.

How to display this screen: At the Work with Currency Screen, select Create.

Field	Description
Currency code	A code that represents a type of currency. *Alphanumeric, 3 positions.* *Create screen: required.* *Change screen: display-only.*
Description	The description of the currency code. *Alphanumeric, 30 positions; required.*

Field	Description
Date of last update	The most recent date on which the conversion rate was updated. **Note:** The system does not update this field. *Numeric, 6 positions (in user date format); required.*
Conversion rate	The rate at which this currency is converted to the local currency in purchase order maintenance and receipts. The system divides the amount in the foreign currency by the conversion rate to determine the amount in your local currency; for example, if you set the conversion rate for Canadian dollars at 1.3, the system would convert $10.00 to $7.69 in your local currency, dividing 10 by 1.3. Should be set to 1.00 for the Local Currency Code (A55). Currency conversion settings for purchase order maintenance and receiving are defined in the Vendor table. See Working with Vendors (WVEN) for more information. **Note:** This field does not support a number with more than four positions in front of the decimal point; otherwise, your entry will be truncated. For example, if you enter 12345.1234567, it will be truncated to 2345.1234567. *Numeric, 13 positions with a 7-place decimal; required.*
Shadow entity	This field displays only if the Multi Currency by Offer (E03) system control value is selected; it is required for all currencies except your local currency, as defined in the Local Currency Code (A55) field in the System Control table. Entity codes are defined in and validated against the Entity table; see Working with Entities (WENT). *Numeric, 3 positions; required.*

Working with Sales Representatives (WSLS)

Purpose: Use the Sales Representatives function to create or maintain sales representative information:

- the name and email address of your sales representatives
- the sales representative numbers that you assign to them

- the centers to which your sales representatives are assigned (for example, regional centers or product line groups)
- the commission and bonus structure for your sales representatives.

Uploading sales representatives: You can also create or update records in the Salesman table by uploading them from an external system; see Salesman Associate Upload for instructions.

In this topic:

- Work with Salesrep Screen
- Create Salesrep Screen

Work with Salesrep Screen

How to display this screen: Enter WSLS in the *Fast path* field at the top of any menu or select Work with Salesreps from a menu.

Field	Description
SLS# (Sales representative number)	A code that represents the sales representative. *Numeric, 7 positions; optional.*
Name	The name of the sales representative. *Alphanumeric, 30 positions; optional.*
Center	A code that represents the center to which this sales representative is assigned. Center codes can be used to group sales representatives (for example, region or product line). *Alphanumeric, 4 positions; required.*

Screen Option	Procedure
Create sales representative codes	Select Create to advance to the Create Salesrep Screen.
Change sales representative information	Select Change for a salesrep to advance to the Change Salesrep screen. At this screen you can change any information except the sales representative code. See Create Salesrep Screen for field descriptions
Delete sales representative information	Select Delete for a salesrep to delete it.
Display sales representative information	Select Display for a salesrep to advance to the Display Salesrep screen. You cannot change any information on this screen. See Create Salesrep Screen for field descriptions.

Create Salesrep Screen

Purpose: Use this screen to create a new sales representative.

How to display this screen: Select Create on the Work with Salesrep Screen.

Field	Description
Salesrep #	A code that represents a sales representative. The system performs a modulus 10 check against the salesrep number on the Create or Change Salesrep screen when the Modulus 10 Check on Salesrep Number (E88) system control value is selected. An error message indicates if the salesrep number fails the modulus 10 check: **Salesman# is invalid or missing.** *Numeric, 7 positions.* *Create screen: required.* *Change screen: display-only.*
Name	The description of the sales representative code. This is commonly the name of the sales representative. *Alphanumeric, 30 positions; required.*
Email Address	The salesrep's email address. The system verifies that: • there is an @ sign and a period (.) • there is some text: – before the @ sign – between the @ sign and the period – after the period If the email address does not meet these criteria, the system does not let you create it. For example, the system would not let you create an email address such as: • @example.com • firstlast@example • firstlast@.org • www.example.com The system does not confirm that your entry represents a valid email address, that the domain name (such as "example" in example.com) exists, or that the extension (such as "com" in example.com) exists. *Alphanumeric, 50 positions; optional.*
Active	Defines whether the salesrep is active. • Selected (default) = The salesrep is active. • Unselected = The salesrep is not active. The system validates that the salesrep is active when you define the salesrep on the Work with Order Screen in Order Entry or receive an order through the *Generic Order Interface (Order API)* that contains a salesrep. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). **Note:** Searching for an order based on salesrep in Contact Center is available only if the salesrep is currently flagged as active.

Field	Description
Home Store	The code identifying the default store location for the salesrep. Validated against the Store Cross Reference table; see Work with Store Cross Reference (WSCR). If the Store Cross Reference record is flagged as Active and the order is not fulfilled through the Order Orchestration integration, the store's code, description, address, and phone number are included in the *OriginatingStore* element in the *Outbound Email XML Message (CWEmailOut)*. See the *OriginatingStore* element for more information. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). *Numeric, 10 positions; optional.*
Center code	A code that represents the center to which this sales representative is assigned. Center codes can be used to group sales representatives (for example, region or product line). *Alphanumeric, 4 positions; required.*
Additional bonus	The additional bonus that the sales representative receives if the value from Over quota break is met or exceeded. *Additional bonus* works in conjunction with *Over quota break*. *Numeric, 5 positions; required.*
Over quota break	The quota, in dollars, that the sales representative must meet or exceed to receive an additional bonus. *Over quota break* works in conjunction with Additional bonus. *Over quota break* and *Additional bonus* are in addition to Quota and Commission % as incentives to your sales representatives. *Numeric, 5 positions; required.*
Quota	A sales goal, in dollars, that the sales representative must meet or exceed to receive a commission. *Quota* works in conjunction with Commission %. *Numeric, 7 positions; required.*
Commission %	The percentage of sales earned by the sales representative if the value from Quota is met or exceeded. *Commission %* works in conjunction with Quota. *Numeric, 5 positions with a 2-place decimal; required.*
Phone	The phone number where the salesrep can be reached. You can define a telephone number format for each country to map to the phone numbers operators enter into the system. See Setting Up the Country Table (WCTY). *Alphanumeric, one 14-position field (phone number) and one 4-position field (phone extension); optional.*
User field 1	This field is informational only. *Alphanumeric, 2 positions; optional.*
User field 2	This field is informational only. *Alphanumeric, 2 positions; optional.*
User field 3	This field is informational only. *Alphanumeric, 2 positions; optional.*
User field 4	This field is informational only. *Alphanumeric, 2 positions; optional.*

Field	Description
Number of sales life-to-date	The number of sales for this sales representative. This figure is cumulative across years. This field is a count of orders shipped. If back orders result in multiple shipments, Order Administration updates this field with each shipment. *Numeric, 5 positions; display-only.*
Number of returns life-to-date	The number of return transactions for this sales representative. This figure is cumulative across years. This field is neither a count of units nor a count of orders. Each time items from an existing order are returned -- regardless of the quantity returned or the number of lines affected by the return -- Order Administration considers this 1 return transactions and this field is updated. Order Administration updates this field if you use a return reason code in Order Maintenance or Return Authorization. If an order has multiple returns, Order Administration updates this field for each return transaction. *Numeric, 5 positions; display-only.*
Number of exchanges life-to-date	The number of exchange transactions for this sales representative. This figure is cumulative across years. This field is neither a count of units nor a count of orders. Each time items from an existing order are exchanged -- regardless of the quantity exchanged or the number of lines affected by the exchange -- Order Administration considers this 1 exchange transaction and this field is updated. Order Administration updates this field if you use an exchange reason code in Order Maintenance or Return Authorization. If an order has multiple exchanges, Order Administration updates this field for each exchange transaction. *Numeric, 5 positions; display-only.*
Sales $ life-to-date	The dollars associated with all sales for this sales representative. This figure is cumulative across years. *Numeric, 20 positions with a 2-place decimal; display-only.*
Returns $ life-to-date	The dollars associated with all return transactions for this sales representative. This figure is cumulative across years. *Numeric, 20 positions with a 2-place decimal; display-only.*
Exchanges $ life-to-date	The dollars associated with all exchange transactions for this sales representative. This figure is cumulative across years. *Numeric, 20 positions with a 2-place decimal; display-only.*

6 Customer Service

Establishing Customer Service Tables

Topics in this part: The following topics describe how to create and maintain customer support tables that work in conjunction with Order Entry, Order Maintenance, and other Customer Service functions.

- Establishing Order Types (WOTY) presents the screens you work with to create and maintain order types required for Order Entry.
- Establishing Price Override Reason Codes (WPOR) presents the screens you work with to create and maintain price override reason codes needed for entering item prices at no charge and for overriding prices in Order Entry and Order Maintenance.
- Establishing Additional Charge Codes (WADC) describes how to create and maintain codes that let you add additional charges or credits to an order.
- Establishing Order Hold Reason Codes (WOHR) describes how to create and maintain user-defined reason codes that you apply when you want to place an order on hold.
- Establishing Cancel Reason Codes (WCNR) describes the screens you work with to create and maintain reason codes for canceling items from an order.
- Establishing Return Reason Codes (WRTR) describes the screens you work with to create and maintain reason codes for returning items.

- Establishing Exchange Reason Codes (WEXR) describes the screens you work with to create and maintain reason codes for exchanging items.
- Establishing Return Disposition Values (WRDV) describes the screens you work with to establish codes that you use to direct returned merchandise to the warehouses and warehouse locations that you have designated to receive returns.
- Establishing Custom Special Handling Formats (WSHF) describes the screens you work with to design the format of the special handling screen that you use in Order Entry.
- Establishing Add Reason Codes (WADR) describes the screens you work with to establish codes for tracking the reasons for adding items to orders in Order Maintenance.
- Working with Order Inquiry Reason Codes (WORC) describes the screens you use to create and maintain reason codes for advancing to order inquiry or order maintenance from the CTI Customer Selection screen.
- Working with Order/Call Disposition Reject Reason Codes (WWRR) describes the screens you work with to create or maintain order and call disposition reject reason codes.
- Working with Default Messages (WMSG) describes the screens you use to create and maintain default messages, used to default message text to an order message or order line message on an order.
- Working with Order Line Activity Codes (WOLA) describes the screens you use to create and maintain order line activity codes.

Establishing Order Types (WOTY)

Purpose: Order type codes identify how you received the order, such as by phone, mail or fax. You can use order type codes for analysis purposes, to control the format of the Order Entry Detail screen, or to indicate whether to:

- display promotional pricing windows.
- display zone date windows for zone reservation (weather-sensitive) items.
- generate soldout notifications for items you sell out through order entry or order maintenance.
- generate immediate backorder notifications.
- perform online credit card authorization and display an authorization response window in order entry.
- generate various types of an email notifications or the *Outbound Email XML Message (CWEmailOut)*, and whether to include soldout items on the order confirmation email message.
  For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
- use the *Experian Data Quality (EDQ) Address Validate API* to standardize addresses.
- treat orders as pre-order quotes instead of regular orders; see *Entering Pre-Order Quotes*.
- indicate that the order originated from an external system and was assigned to Order Administration for fulfillment via the *Order Orchestration Integration*.

- identify a ship-for-pickup order to the Order Orchestration primarily by its Order Administration order number or its e-commerce order number.
- indicate that the order originated in Order Administration but the customer prefers to pick up the order at a store location that has the inventory available; see *Store Pickup Orders*.
- use override template text for certain email notification types.
- indicate that the order originated through the ChannelAdvisor integration; see the *ChannelAdvisor Order Type (L90)* and the *ChannelAdvisor Integration Overview*.

The order API uses the *E-Commerce Order Type (G42)* if no order type is specified in the message. If that system control value is also blank, the order is created in error status.

Each order must have an order type.

In this topic:

- *Work with Order Types Screen*
- *Create Order Type Screen*
- *Order Type Email Selection Screen*
- *Order Type Email Template Screen*
- *Change Order Type Email Template Screen*

Work with Order Types Screen

How to display this screen: Type *WOTY* in the Fast path field at the top of any menu, or select Work with Order Types from a menu.

Field	Description
Type	Identifies how you receive an order. Alphanumeric, 1 position; optional.
Description	The description associated with the order type. Alphanumeric, 30 positions; optional.
Promo	Determines whether to display promotional pricing windows for orders with this order type. Promotional pricing windows open if the customer orders a specific item or quantity of items, and also display items that the customer can order for a special price. Valid values are: • *None* = Do not display promotional pricing pop-up windows. Also, do not open the *Display Coordinate Items Window* in Classic View order entry or the **Select Coordinate Items** window in Contact Center entry. • *P*romo Price = Display the Promotional Pricing window. Also, open the *Display Coordinate Items Window* in Classic View order entry, or the **Select Coordinate Items** window in Contact Center order entry. **For more information:** See *Upselling the Customer in Order Entry* for information on promotional pricing, and see *Automatically Display Coordinate Items in Order Entry (I53)* for more information on adding coordinate items to an order. Optional.

Field	Description
S/O (soldout)	Controls whether to generate soldout notifications when an item sells out in order entry or order maintenance. Valid values are: • *Yes* = Generate a soldout notification for an item that sells out in order entry or maintenance • *No* = Do not generate soldout notifications unless you sell out items through *Processing Auto Soldout Cancellations (MASO)*. You might choose this setting for phone orders, because normally you can notify the customer immediately if an item is sold out. Optional.
Mail/Rtl	Indicates whether this is a mail order or retail order type. Informational only. Valid values are: • *Mailorder* = Mail orders. • *Retail* = Retail sales. Optional.
Whs	The warehouse defined for the order type. Used for: • *Retail order defaults:* If the Retail Order Defaults (F59) system control value is *selected*, the system defaults the warehouse defined here to the Warehouse field on the Enter Location pop-up window when you enter an express bill order. • *Non-allocatable warehouse:* If the *Reserve from Non-Allocatable Warehouse (J25)* system control value is *selected*, the system allows you to enter a non-allocatable warehouse code in this field, regardless of the setting of the Mail order/retail flag. Orders entered for this order type reserve against the non-allocatable warehouse specified. Numeric, 3 positions; optional.

Screen Option	Procedure
Create an order type	Select *Create* to advance to the *Create Order Type Screen*.
Change an order type	Select *Change* for an order type to advance to the Change Order Type screen. You can change any information on this screen except the order type code. See *Create Order Type Screen* for field descriptions.
Delete an order type	Select *Delete* for an order type to delete it. **Note:** When you delete an order type code you lose: • History associated with the order type • Visibility to the description on orders containing the code

Screen Option	Procedure
Display an order type	Select *Display* for an order type to advance to the Display Order Type screen. You cannot change any information on this screen. See *Create Order Type Screen* for field descriptions.
Work with user defined fields	Select *User Field* for an order type to advance to the *Work with User Fields Screen*.
Suppress generation of individual email notifications for the order type	Select *Email Selection* for an order type to advance to the *Order Type Email Selection Screen*. **Note:** This option is available only if the order type's *Email notification* flag is *selected*.
Work with email notification templates for the order type	Select *Email Template* for an order type to advance to the *Order Type Email Template Screen*. **Note:** This option is available only if the order type's *Email notification* flag is *selected*.

Create Order Type Screen

Purpose: Use this screen to create an order type.

How to display this screen: Select *Create* at the *Work with Order Types Screen*

Field	Description
Type	Indicates how the order was received, such as from the web storefront, a retail integration, or other methods. Alphanumeric, 1 position Create screen: required. Change screen: display-only.
Description	The description of the order type. Alphanumeric, 30 positions; required.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Promo windows</td><td>Controls whether to display promotional pricing windows for orders with this order type.
Valid values are:
• None = Do not display promotional pricing pop-up windows
• Promo = Display promotional pricing windows
You can define promotional pricing to take place at the dollar, group, or item level, including:
• Order dollar discount or a free gift when the order reaches a set dollar level
• Order dollar discount or a free gift when the customer orders from a specific item group defined in the Item table
• Item discount or a free gift when the customer orders a specific item defined in the Item table
If you set this field to Promo, a pop-up window opens in Order Entry when the operator enters an item associated with a promotional pricing promotion.
See Upselling the Customer in Order Entry.
Required.</td></tr>
<tr><td>Zone date windows</td><td>Controls whether to display an informational zone reservation date window in order entry when the customer orders a zone reservation-coded item. Zone reservation codes identify weather-sensitive inventory, such as plant stock, which require restricted shipping dates.
Valid values are:
• selected = Display an informational pop-up window in order entry when an order includes a zone reservation-coded item whose shipping date window has not yet opened.
• unselected = Do not display the pop-up window in order entry.
Generally, you would select for phone orders, since you can notify the customer of the date the item will ship and deselect for mail orders. See Shipping Zone Reservation Overview for more information.</td></tr>
<tr><td>Soldout notifications</td><td>Controls whether to generate soldout notifications for items that you sell out through order entry or order maintenance.
Valid values are:
• Selected = Generate a soldout notification for items that you sell out in order entry or order maintenance. You can sell out an item by selecting it in order entry or maintenance; also, if the item is currently flagged with the appropriate soldout control code, it sells out automatically when you add it to an order.
• Unselected = Do not generate soldout notification cards for this order type except for items sold out through Processing Auto Soldout Cancellations (MASO). Generally, you would deselect for phone orders, since you can notify the customer immediately that the item is sold out.

Note:
This flag does not apply to quote orders. The system does not generate soldout notifications for items sold out in order entry or maintenance for quotes.</td></tr>
</table>

Field	Description
Exclude S/O on order confirmation	Indicates whether to exclude soldout items on the order confirmation email or the *Outbound Email XML Message (CWEmailOut)*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). **Note:** The system excludes soldout items from the order confirmation email only if the program in the *Order Acknowledgement Program (G50)* system control value is based on the *ECR0318* or *ECR0405* base program. For example, you might wish to exclude soldout items on order confirmations for phone orders, but include soldout items for orders you receive through the order API. • *Selected* = Exclude soldout items on the order confirmation email or the *Outbound Email XML Message (CWEmailOut)*. **Note:** If the soldout item is the only item on the order and you exclude soldout items from the order confirmation, the system does not generate the email. 1. *Unselected* = Include soldout items on the order confirmation email or the *Outbound Email XML Message (CWEmailOut)*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Mail order/ Retail	Indicates whether to treat the order as a mail order or a retail sale. Informational only. Valid values are: • *Mailorder* = Mail or e-commerce orders. • *Retail* = Retail sales, such as in a retail outlet. Required.

Field	Description
Retail warehouse	The warehouse defined for the order type. Used for: • *Retail order defaults:* If the Retail Order Defaults (F59) system control value is *selected*, the system defaults the warehouse defined here to the Warehouse field on the Enter Location pop-up window when you enter an express bill order. • *Non-allocatable warehouse:* If the *Reserve from Non-Allocatable Warehouse (J25)* system control value is *selected*, the system allows you to enter a non-allocatable warehouse code in this field, regardless of the setting of the Mail order/retail flag. Orders entered for this order type will reserve against the non-allocatable warehouse specified. In order to enter a warehouse code in this field: • The Mail order/retail field must be set to *R*, or • The *Reserve from Non-Allocatable Warehouse (J25)* system control value must be *selected*. Numeric, 3 positions; optional.
Immediate B/O notice	Indicates whether to generate an initial (first) backorder notification card the next time you run *Generate Backorder Notices (GBOC)*. Valid values are: • *Selected* = Generate backorder cards immediately • *Unselected* = (Default): Do not generate backorder cards immediately Typically, you *select* this setting for mail orders because you do not have an opportunity to inform the customer of the expected delivery date when you enter the order. If you have defined a *Number of Days to Delay Initial Backorder Notice (D89)*, the system does not generate a notice for a backordered item unless the expected ship date is after this number of days. • Once an expected delivery date for a backordered item is expired or changed, the system automatically generates a backorder notice, regardless of the setting of this field. • This flag does not apply to quotes. The system does not generate backorder notices for quotes.

Field	Description
Email notification	Indicates whether to generate order-related email notifications to the customer. Valid values are: • *Selected* = Generate email notifications or the *Outbound Email XML Message (CWEmailOut)*. If you use the *Narvar Integration*, shipment notifications to customers are generated through Narvar, so this flag must be selected to have the order request generated to Narvar. • *Unselected* = Do not generate email notifications or the *Outbound Email XML Message (CWEmailOut)*; create a document for printing instead if available. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Even if this setting is selected, the system generates email notifications only if all the required information is available and if you have not flagged the notification type at the *Order Type Email Selection Screen* to prevent generation. See *Working with E-Mail Notification Templates (WEMT)* for an overview of the logic the system uses to determine whether to generate an email notification, and for information on setting up your company to generate email notifications. • This flag does not control automatic email generation for quote order types (with the exception of the soldout notification and the Quote confirmation for orders received through the order API), or for stored value card notices, “contact us” emails, maintenance failure notices, or credit card decline notices. • If this flag is *unselected*, you cannot advance to the *Order Type Email Selection Screen* or *Order Type Email Template Screen*. • This flag *must* be *selected* for the *Store Pickup Order Type (L33)* so the system can generate the email notifying the customer that the order is ready for pickup. See *Store Pickup Confirmation Email Program (L48)* for background.
On-line authorization	Indicates whether to perform online credit card authorization during order entry and order maintenance. Valid values are: • *Window* = Perform online credit card authorization for credit card payment methods during order entry/maintenance and display the *Select Authorization Response Option Window* when an authorization response is received. • *Without Window* = Perform online credit card authorization for credit card payment methods during order entry/maintenance and do not display the window. • *Not Eligible* = Do not perform online credit card authorization for this order type. The system performs credit card authorization during pick slip generation. See *Performing Online Credit Card Authorizations* for an overview of the online credit card authorization process. This field displays only if the *On-line Authorizations (B89)* system control value is *selected*. Required.

Field	Description
Address standardization	Controls whether to use the Experian Data Quality (EDQ) Address Validate API for address standardization. • *Selected* = Use EDQ for address standardization. • *Unselected* = Do not use EDQ for address standardization. See *Experian Data Quality (EDQ) Address Validate API* for an overview and required setup. Required.
Quote	Indicates whether an order of this order type is a pre-order quote and not a regular order. Valid values are: • *Selected* = An order for this order type is a pre-order quote. See *Entering Pre-Order Quotes* for an overview and the required setup. • *Unselected* = An order for this order type is a regular order. See *Entering Orders*. Optional.
Expiration days	Indicates the number of days a pre-order quote is valid before it expires. When you accept a pre-order quote in order entry, the system updates the Cancel date for the quote based on the quote's arrival date and the expiration days specified here. The system removes the cancel date when you convert the quote to an order. *Example:* If the arrival date for a quote is 10/29/11 and the expiration days defined for the quote order type is 30, the system updates the Cancel date for the quote to 11/28/11. **Note:** If you change the order type for a quote to another order type whose Quote field is also *selected*, the system recalculates the cancel date for the quote based on the Expiration days field for the new order type. If an Expiration days has not been defined for the new order type, the system removes the cancellation date from the quote. **Note:** You can enter a value in this field only if the Quote field is *selected*. Numeric, 3 positions; optional.

Field	Description
Pay method required	Indicates whether a pay method is required on a pre-order quote. Valid values are: • *Selected* = A pay method is required on a pre-order quote. You cannot add a pre-paid pay method to a quote. • *Unselected* = A pay method is not required on a pre-order quote. The system does not require a pay method until the quote is converted to an order. If you change the order type for a quote to another order type whose Quote field is also *selected*, the setting of the Pay method required field for the new order type determines whether to require a payment method. **Note:** You can select this field only if the Quote field is *selected*. Optional.

Order Type Email Selection Screen

Purpose: Use this screen to prevent the system from generating emails or the *Outbound Email XML Message (CWEmailOut)* for certain types of notifications for an order type.

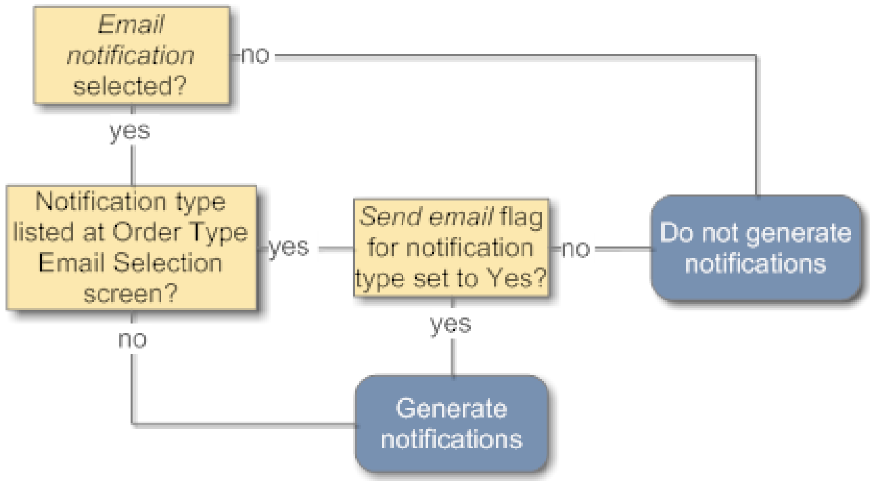
For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

You might want to prevent generating certain notices for order types that Order Administration fulfills as part of an integration with an external system. For example, if you create store pickup orders as part of the integration with Order Orchestration, you might want to suppress generation of shipment confirmation emails, because the customer picks up the order in a store location rather than receiving a shipment, so the shipment confirmation might confuse the customer; however, you might want to continue generating order confirmation emails for that order type, and you require the *Email notification* flag to be *selected* so that store pickup notifications are generated.

To suppress all notifications for an order type, *deselect* the *Email notification* flag.

Determining whether to generate an notice:

1. If the *Email notification* flag for the order type is *unselected*, do not generate any notices. Otherwise,
2. If the *Email notification* flag for the order type is *selected*, is the notification type included in the Order Type Email Selection screen? If not, generate the notice. Otherwise,
3. If the *Email notification* flag for the order type is *selected* and the notification type is included at the Order Type Email Selection screen, is the notification type *set to Yes*? If it is, generate the notice. Otherwise,
4. If the notification type is *set to No* at the Order Type Email Selection screen, do not generate the notice.



Things to note:

- *Default setting:* If the *Email notification* flag for the order type is *selected*, each Order Type Email Selection setting is *set to Yes* by default.
- *Screen access:* If the *Email notification* flag for the order type is *unselected*, you cannot advance to the Order Type Email Selection screen.
- *Additional rules:* Each notice type is still subject to the additional generation rules described in *Working with E-Mail Notification Templates (WEMT)*. For example, the system checks the customer's opt-in/out setting and whether there is an email program defined in the related system control value.
- *Quotes:* The Order Type Email Selection settings (with the exception of the Soldout Notification setting) do not apply to quote order types, regardless of the setting of the *Email notification* flag for the quote order type. The system does not automatically generate any emails except the soldout notification for quotes you create through interactive order entry until you accept them and change them to non-quote orders, although you can generate the Quote Confirmation or "Contact Us" emails for a quote on demand. See *HTML Format Notification Samples and Contents* for examples and more information.
- *Template selection is separate:* The email selection rules you set at this screen operate independently of the rules that govern which template to use for a notification. See the *Order Type Email Template Screen* for more information on setting up templates.

Narvar: The Send Email setting for the Shipment Confirmation here does not prevent generating shipment notifications through the *Narvar Integration*.

How to display this screen: Select *Email Selection* for an order type at the *Work with Order Types Screen*. This option is available only if the *Email notification* flag for the order type is *selected*.

Field	Description
Order type	The code and description of the order type you selected at the *Work with Order Types Screen*. Code: alphanumeric, 1 position; display-only. Description: alphanumeric, 30 positions; display-only.

Field	Description
Notification type	The type of notification that you would like to generate or suppress for this order type. Only certain notification types are available for selection; the system automatically generates the additional notification types that are not listed at this screen if the *Email notification* flag for the order type is *selected*. **Available types:** • Backorder 1st Notice • Backorder 2nd Notice • Backorder Continue Notice • C/C Credit Acknowledgment • Order Cancel Confirmation • Order Confirmation • Order Line Cancel Confirmation • Return Confirmation • Soldout Confirmation • Shipment Confirmation **Note:** The Shipment Confirmation setting also controls generation of a request with the customer's actual email address through the *Narvar Integration*. **Automatic generation of other notification types that are not listed:** Any additional notification types that are not listed at this screen are generated automatically for the order type if the *Email notification* flag for the order type is *selected* and the customer and order are otherwise eligible. These additional notification types are: • Credit Card Decline • Loyalty Activate Notice • Loyalty Deactivate Notice • Maintenance Failure • Membership Cancel Confirmation • Stored Value Card Notification See *Working with E-Mail Notification Templates (WEMT)* for more information on how the system determines whether to generate various types of notifications.
Send email	Controls whether to generate this type of notification for the selected order type: **Narvar:** The Send Email setting for the Shipment Confirmation here does not prevent generating shipment notifications through the *Narvar Integration*. *Yes* (default) = Generate the notification type if the customer and order are eligible. *No* = Do not generate this notification type for the selected order type.

Completing this screen: When you first advance to this screen, the Send email flags for each notification type are set to *Yes* by default. Change the setting of the Send email flag for each notification type you would like to update and select *OK*. Your changes take effect immediately.

Other updates to notification types: See *Email Generation Setup* for an overview of setup requirements and options, including the hierarchy for notification template text and the “from” email address.

Order Type Email Template Screen

Purpose: Use this screen to work with the template text for the order, shipment, order cancellation, and order line cancellation confirmation notices for a specific order type. You can also change the setting of the XML only? flag if you would like to specify whether to generate an actual email or the *Outbound Email XML Message (CWEmailOut)*.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

> **Note:**
>
> The system does not automatically create an order type template. To create a template for one of the notifications types, you need to select the *Change* option and complete the *Change Order Type Email Template Screen*.

When does the system use this template? The system uses the text and XML only? setting from the order type if there is no template set up at the order type/entity or entity level. The hierarchy for template selection is:

1. Order type/entity level (set up through the *Entity Email Override by Order Type Screen*)
2. Entity (set up through the *Work with Entity Email Overrides Screen*)
3. Order type (set up through this screen, the Order Type Email template screen)
4. Company (set up through *Work with E-Mail Template Screen*)

> **Note:**
>
> Although the screen does not prevent you from setting up templates for a quote order type, the system never generates any of the notifications available at this screen until you accept the quote and change it to a new order type; and, at that time, the templates for the new order type apply.

These settings are not used for the generation of shipment notifications through the *Narvar Integration*.

What about other notification types? You cannot set up email templates at the order type or order type/entity level for any other notification types besides the order, shipment, order cancellation, and order line cancellation notices. For the remaining notification types, the hierarchy is:

1. Entity (set up through the *Work with Entity Email Overrides Screen*)

2. Company (set up through *Work with E-Mail Template Screen*)

Notification type selected for order type? The system does not prevent you from creating or changing an email template whose Send email flag is set to *No* at the *Order Type Email Selection Screen*, although in this situation the system does not generate the notification.

Narvar integration: The template settings do not apply to shipment notifications generated through the *Narvar Integration*.

How to display this screen: Select *Email Template* for an order type at the *Work with Order Types Screen*. This option is available only if the *Email notification* flag for the order type is *selected*.

Field	Description
Order type	The code and description of the order type you selected at the *Work with Order Types Screen*. Code: alphanumeric, 1 position; display-only. Description: alphanumeric, 30 positions; display-only.
Notification type	A notification type whose template you can create, change, display, or delete at this screen. Notification types you can set up for an order type: • Order Cancel Confirmation • Order Confirmation • Order Line Cancel Confirmation • Shipment Confirmation See *Working with E-Mail Notification Templates (WEMT)* for more information on when the system generates each notification type and the contents of each.

Option	Procedure
Create a new email template at the order type level	In the Action drop down list, select *Change* for a template to advance to the *Change Order Type Email Template Screen*, where you can enter template text and optionally select the XML only? flag if you would like to generate the *Outbound Email XML Message (CWEmailOut)* rather than an actual email. **Note:** There is no *Create* option at this screen; use the *Change* option to create a new template. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Option	Procedure
Change an existing email template at the order type level	In the Action drop down list, select *Change* for a template to advance to the *Change Order Type Email Template Screen*, where you can change the template text and optionally change the setting of the XML only? flag if you would like to specify whether to generate an actual email or the *Outbound Email XML Message (CWEmailOut)*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Display an email template at the order type level	In the Action drop down list, select *Display* for a template to advance to the Display Order Type Email Template screen, where you can review an existing template or verify whether the template has been set up. See the *Change Order Type Email Template Screen* for field descriptions.
Delete an email template at the order type level	In the Action drop down list, select *Change* for a template to advance to the *Change Order Type Email Template Screen*, where you can delete the contents of the template.

Change Order Type Email Template Screen

Purpose: Use this screen to:

- create a new order type-level template
- change an existing order type-level template
- delete an existing order type-level template

These settings are not used for the generation of shipment-related emails through the *Narvar Integration*.

How to display this screen: Select *Change* for a notification type at the *Order Type Email Template Screen*.

Field	Description
Notice Type	The notice type you selected at the *Order Type Email Template Screen*. Display-only.
Order Type	The code and description of the order type you selected at the *Work with Order Types Screen*. Code: alphanumeric, 1 position; display-only. Description: alphanumeric, 30 positions; display-only.

Field	Description
XML only?	Indicates whether to generate the *Outbound Email XML Message (CWEmailOut)* rather than an actual email notification. This XML message includes additional information that is not included in the standard email notice. You might choose to generate the XML message so that you can use the information to produce a reformatted HTML email that includes promotional material. See *Outbound Email XML Message (CWEmailOut)* for an overview. Valid values are: 1. *Selected* = Generate the *Outbound Email XML Message (CWEmailOut)* rather than an actual email 2. *Unselected* = Generate the email notification *Used only if there is text:* The system uses the setting of this flag at this level only if there is also text set up for the template at this level. For example, if you select this flag for the order confirmation template for an order type, but do not enter any text, the system continues up the hierarchy and checks the setting for the order confirmation template at the company level (set up through *Working with E-Mail Notification Templates (WEMT)*). For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Text to print above items	The standard text to include in each email above the information specific to the order. This text is also included in the *Outbound Email XML Message (CWEmailOut)*. Select *Dflt Frm Comp* to copy the Text to print above items and Text to print below items to the screen from the company-level template, and then edit as needed. Alphanumeric, ten 60-position lines; at least one line required. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Text to print below items	The standard text to include in each email below the information specific to the order. This text is also included in the *Outbound Email XML Message (CWEmailOut)*. Select *Dflt Frm Comp* to copy the Text to print above items and Text to print below items to the screen from the company-level template, and then edit as needed. Alphanumeric, three 60-position lines; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Completing this screen:

- **Create a new template:**
  - Optionally, *select* the XML only? flag to *Outbound Email XML Message (CWEmailOut)* rather than an actual email notification

    For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

- Optionally, select *Dflt Frm Comp* to copy the Text to print above items and Text to print below items to the screen from the company-level template, and then edit as needed.
- If you did not default text from the company-level template, enter the Text to print above items. You must define at least one line of text.
- Optionally, enter the Text to print below items
- Click *OK* when you are done to save your changes, or click *Exit* to exit without saving.

- **Change an existing template:**
  - Optionally, change the setting of the XML only? flag indicating whether to generate the actual email or the *Outbound Email XML Message (CWEmailOut)*

    For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
  - Optionally, change the Text to print above items or the Text to print below items, or enter additional text.
  - Click *OK* when you are done to save your changes, or click *Exit* to exit without saving.
- **Delete an existing template:**
  - Delete each line of text in the Text to print above items and Text to print below items.
  - Click *OK* when you are done to delete the template, or click *Exit* to exit without deleting.

Establishing Price Override Reason Codes (WPOR)

Purpose: Price override reason codes let an authorized operator change an item price or enter an item at no charge in Order Entry or Order Maintenance. You need to designate one or more price override reason codes for promotional or upsell items that may be added to an order automatically. When an item is added to the order from a promotion, the system updates the Override field on the order detail line with the default override reason code designated for the type of promotion or upsell so that you can track the discounts by override reason. Price overrides apply only at the line item level.

The Price Override Reason table stores the number of price overrides and the net discount associated with each reason code.

Default Price Override Reasons

You can set up the following default price override reason codes in the System Control table:

- *Default Price Override Reason (B35)*
- *Price Override Code for Promotional Priced Lines (B61)* **Note:** This system control value is not currently implemented. The system applies the *Default Price Override Reason (B35)* to promotional priced lines.
- *Price Override Reason for Same Price Exchanges (D92)*
- *Price Table Level Override Code (E05)*

- *Default Price Override Reason for Warranty Items (G01)*
- *Price Override Reason for E-Commerce (G73)*
- *Price Override Reason for SVC Refund Item (I74)*
- *Price Override Reason for Price Matrix Customer Specials (K42)*
- *Price Override Reason for Promotions (K45)*
- *Price Override Reason for Quotes (K75)*
- *Order Broker Price Override (K95)*
- *Price Override Reason Code for CPG Pricing (L59)*
- Price Override Reason for ORPE Discounts (M78)

> **Note:**
>
> You cannot apply the *Price Override Reason for Price Matrix Customer Specials (K42)*, *Price Override Reason for Promotions (K45)*, or *Price Table Level Override Code (E05)* to an order line in order entry; these price override reason codes are reserved for system use.

See the description of each system control value for more information.

ChannelAdvisor default: The ChannelAdvisor integration uses a price override reason code of *W*. You cannot change this default. See *ChannelAdvisor Integration Overview* and *ChannelAdvisor Setup* for background.

Secured features: The *Price Overrides (A23)* secured feature controls the ability to override a price in order entry, and the *Override Price Override Limit (A64)* controls the ability to exceed the *Price Override Limit Percent (E55)*.

Report: You can use the *Printing the Price Override Reason Report (PROR)* option to generate a report indicating the number of units, discount amount, and discount percentage applied through price override reason codes. The report does not include price override reason codes whose Exclude from price override report field is selected.

In this topic:

- *Overriding the Item/SKU Offer Price*
- *Work with Price Override Reason Screen*
- *Create Price Override Reason Screen*

Overriding the Item/SKU Offer Price

The *Override item offer price* field for a price override reason code indicates whether to use the price override amount entered in order entry as the item/SKU offer price for the order. The item offer price is stored in the Order Detail table for each order line. The following table describes how the system handles various functions depending upon how this flag is set for a price override reason code:

Function	Flag is Selected	Flag is Unselected	For Example, see:
calculating the discount amount on an order or order detail line	The discount amount equals the difference between the override price entered and the final selling price; in other words, it equals any additional discounts applied after the price override. When an item is added to the order at no charge (for example, an accompanying item) then the regular offer price is not included in the discount total on the order	• If an item/SKU offer price exists, the discount amount equals the difference between the offer price and the selling price. When an item is added to the order at no charge (for example, an accompanying item) then the regular offer price is included in the discount total on the order. • If an item/SKU offer price does not exist, the discount amount equals the selling price of the item, presented as a negative number.	The *Discount* field at the *Display Invoice Header Screen*
evaluating the order or order detail line for a minimum coupon dollar amount	The system uses the price override amount entered to evaluate the order or line for a dollar minimum	The system uses the regular, single-unit offer price of the item or SKU to evaluate the order or line for a dollar minimum. If there is no offer price, the item cannot qualify for a coupon with a dollar minimum.	*How an Order or Item Qualifies for a Coupon*
highlighting discounted prices if the Display Order Line Discount Messages (F01) system control value is *selected*	The system does not highlight the overridden price.	The system highlights the overridden price and displays the discount calculation message if an item/SKU offer price exists.	The *Display Order Line Discount Messages (F01)* system control value and *Discount Calculation Messages*
calculating freight using the By Offer Price freight method for a source code (see for an overview)	The system uses the actual price to calculate freight charges for the order	The system uses the original offer price to calculate freight charges for the order	

Work with Price Override Reason Screen

How to display this screen: Enter *WPOR* in the Fast path field at the top of any menu or select Work with Price Override Reasons from a menu.

Field	Description
Reason	Represents a reason for overriding a price during order entry or order maintenance. Alphanumeric, 1 position; optional.
Description	The description associated with the price override reason code. Alphanumeric, 30 positions; optional.

Screen Option	Procedure
Create a price override reason code	Select *Create* to advance to the *Create Price Override Reason Screen*.
Change a price override reason code description	Select *Change* for a code to advance to the Change Price Override Reason screen. At this screen, you can change only the description. See *Create Price Override Reason Screen* for field descriptions.
Delete a price override reason code	Select *Delete* for the code. **Note:** You can delete a price override reason code at any time. However, you will lose any data associated with the reason code that is stored in the Price Override table. Additionally, if the reason code is defined as a default in the System Control table, deleting the code causes the system to display error messages in order entry.
Display a price override reason code	Select *Display* for a code to advance to the Display Price Override Reason screen. You cannot change any information on this screen. See *Create Price Override Reason Screen* for field descriptions.

Create Price Override Reason Screen

Purpose: Use this screen to create price override reason codes for use in Order Entry and Order Maintenance.

How to display this screen: Select *Create* at the *Work with Price Override Reason Screen*.

Field	Description
Price override code	Identifies the reason to override a price during order entry or order maintenance. Alphanumeric, 1 position. Create screen: required. Change screen: display-only.
Description	The description associated with the price override reason code. Alphanumeric, 30 positions; required.
Override item offer price	This flag indicates whether to use the price override amount entered in order entry as the item/SKU offer price for the order. The item offer price for each order line is stored in the Order Detail table. Valid values are: • *Selected* = Override the price, if any, specified for the item/SKU offer on the Order Detail line, and store the price override amount in the Original price and Offer price fields in the Order Detail table. • *Unselected* = Do not override the price specified for the item/SKU offer. See *Overriding the Item/SKU Offer Price* for an overview of how each setting works.
Exclude from price override report	This flag indicates whether to exclude the price override code from the *Price Override Reason Report*, which you can use to review the price override reason codes used to discount items for a range of dates, and the total discount amounts and percentages applied. Valid values are: • *Selected* = Exclude the price override code from the Price Override Reason Report. For example, you may wish to exclude system-assigned price override reason codes, such as *Default Price Override Reason (B35)*, from the report; see *Default Price Override Reasons* for a list of system-assigned codes specified in system control values. • *Unselected* = Include the price override code on the Price Override Reason Report.
Exclude from promotion engine discounts	Indicates whether order lines with the reason code assigned, should include/exclude promotion engine discounts. When the ORPE Integration is enabled, OMS will evaluate an order line's price override reason code. Valid values are: • *Selected* = The nonDiscountable and nonQualifying fields are set to true within the applyDeals request message, for that cart line. • *Unselected* = Default. The nonDiscountable and nonQualifying fields are set to false within the applyDeals request message, for that cart line.
Nbr of overrides (Number of overrides)	This field, displayed only on the Display Price Override Reason Code screen, is no longer implemented as of update 21.0. If a number of overrides was tracked for a price override reason code prior to update 21.0, the total is set to zero when the override reason is first used after applying the 21.0 update. To track the usage of a price override reason, generate the *Price Override Reason Report*. Numeric, 5 positions; display-only, updated by the system.

Field	Description
Total discount	The total discount amount represented by usage of this price override reason code. This number is calculated by subtracting the override price from the offer price, and is not updated for price override reason codes whose Override item offer price field is *selected*. **Note:** This field appears on the Display Price Override Reason Code screen only. Numeric, 20 positions with a 2-place decimal; display-only, updated by the system.

Establishing Additional Charge Codes (WADC)

Purpose: Use additional charge codes to add miscellaneous charges or credits to an order.

You can add an additional charge or credit to an order in order entry or order maintenance by selecting *Charges*. You can display the same pop-up window in Work with Return Authorizations if you use the streamlined version; see *Working with Return Authorizations: Streamlined Process*.

You can establish additional charge codes for:

- special handling charges, such as monogramming, engraving, alterations or personalization.
- dollar discounts for an offer or source
- service charges
- shipper additional charges
- credits to offset additional charge codes when processing refunds
- freight credits to apply to Amazon orders

Additionally, use this table to identify whether the additional charge code displays the standard special handling screen, a customized special handling screen, or no special handling screen.

> **Note:**
>
> You can limit the total amount of negative additional charges applied to an order by entering a dollar value in the Negative Additional Charge Limit (E49) system control value.

In this topic:

- *Examples of Additional Charge Codes*
- *Special Handling Overview*

  - *Bypassing or Suppressing the Special Handling Screens*
  - *Overriding the Special Handling Charge or Price*
  - *Putting a Line on Hold through a Special Handling Format*
- *Work with Additional Charges Screen*
- *Create Additional Charges Screen*

Related system control values:

- *Default Additional Charge Code (C45)*: The system uses this code to apply a balance due write-off in order entry.
- Negative Additional Charge Limit (E49): You cannot enter negative additional charges on an order whose *total* will exceed this limit unless you have proper authority, as controlled by the *Override Negative Additional Chrge Limit (A60)* secured feature, described below.
- *Restrict Additional Charge Amount if Default Charge (F43)*: If you set this system control value to *Y*, you will not be able to enter an additional charge amount at the Enter Additional Charges window in order entry, order maintenance, or Work with Return Authorizations for any additional charge code set up with a default charge amount. This system control value works together with the *Enter Amount for Order Additional Charge Code (A80)* secured feature, described below.

See *Special Handling Overview* for additional system control values related specifically to special handling.

Related secured features:

- *Additional Charges Access (A24)*: Controls access to the Enter Additional Charges pop-up window in order entry, order maintenance, or Work with Return Authorizations, accessible by selecting *Charges*. If a user is prohibited from working with additional charges through this secured feature, this setting overrides the settings of any other secured features.
- *Override Negative Additional Charge Limit (A60)*: Controls the ability to override the negative additional charge limit set with the system control value described above.
- Enter Amount for Order Additional Charge Code (A80): Controls the ability to enter an additional charge amount at the Enter Additional Charges pop-up window in order entry, order maintenance, and Work with Return Authorizations (streamlined version only), accessible by selecting *Charges*. Works together with the *Restrict Additional Charge Amount if Default Charge (F43)* system control value described above; see *Adding Miscellaneous Charges or Credits in Order Entry* for a complete description.

See *Special Handling Overview* for additional secured features related specifically to special handling.

Examples of Additional Charge Codes

Type of Charge	Example	Defined Where?
service charge	flat charge applied to an order	Offer or Source Code; see *Setting Up Offer Information*

Type of Charge	Example	Defined Where?
dollar discount	discount (credit) applied to an order based on merchandise total	Offer or Source Code; see *Setting Up Offer Information*
shipper/ item	additional charge for delivery of oversized or heavy items	Shipper/Item (using the additional charge code for this purpose is not currently implemented)
special handling	charge for monogramming or other personalization, hemming, or dyeing	Item SKU/Offer; see *Special Handling Overview* below
restocking fee	charge for processing returns	Ad hoc; Additional Charges pop-up window in Order Entry (*Charges*)
long distance phone credit	credit to customer for phone calls to customer service	Ad hoc; Additional Charges pop-up window in Order Entry (*Charges*)
miscellaneous credits	credit you apply when processing a return to offset an additional charge added in Order Entry	Ad hoc; Additional Charges pop-up window in Order Entry (*Charges*)

Special Handling Overview

What is special handling? Special handling is any type of item personalization, such as monogramming, alterations, engraving, etc. You can also use a special handling code to automatically add a handling charge to an order when the customer orders a specific item, even if there are no actual handling instructions.

What are the two main types of special handling?

- *Standard* special handling (the *S/H type (Special handling type)* is *Standard*) supports entry of free-form text instructions.
- *Custom* special handling (the *S/H type (Special handling type)* is *Custom*) supports entry of specific fields, with default entries and validation. You use the *Establishing Custom Special Handling Formats (WSHF)* menu option for format setup.

What makes an item eligible for special handling? The *Special handling* flag for the item offer or SKU offer controls whether the item is eligible for personalization. If the *Special handling* flag is *selected*:

- *Default special handling:* If there is a *S/H code (Special handling code)* specified for the item offer or SKU offer, and that code's *Bypass S/H* flag is *unselected*, then this type of special handling defaults for the item. See *Bypassing or Suppressing the Special Handling Screens* for a discussion of screen flow based on different special handling options.

- *Optional special handling:* Otherwise, the item receives special handling only if you enter a code in the S/H code field for the item when you are entering the order, select the special handling option for an existing order detail line, or specify a special handling code in order maintenance.

If the *Special handling* flag for the item offer or SKU offer is *unselected*, the item is not eligible for special handling.

How much does the special handling cost? The system determines the special handling charge by:

- If a *S/H price (Special handling price)* is specified for the item offer or SKU offer, use this price; otherwise,
- If a *Default price* or *Default price %* is specified for the special handing format, use this price (this option is available for custom special handling only).

See *Overriding the Special Handling Charge or Price* for a discussion.

Putting the order line on hold: You can flag a custom special handling format to automatically put an order line on hold. See *Putting a Line on Hold through a Special Handling Format* for a discussion.

Contact Center: You can also review, add, update, or delete special handling for an order line in Contact Center. However, Contact Center does not currently support:

1. putting an order line on hold or releasing the line from hold through a special handling format
2. bypassing or suppressing special handling screens

System control values: System control values related to special handling include:

- *FTC -- # of Days to Add for Special Handling (C67)*
- *Enter Custom Special Handling in Upper and Lower Case (D65)*
- *Generate Custom Special Handling File (D66)*
- *Evaluate Special Handling Charges by Order Line (D67)*
- *Tax on Handling (B15)*
- *Display Special Format Response Descriptions in Order Entry (E90)*
- *Include Spaces in Special Handling Edit for Maximum Characters (F80)*

Bypassing or Suppressing the Special Handling Screens

You can set up special handling for an item offer or SKU offer so that you advance automatically to a special handling screen when entering an item; or, you can specify to advance to the screen on demand only; or you can prohibit display of the screen in order entry, but still add the handling charges to the order.

When do you advance to a special handling screen?

- **Automatically when you enter an item:** When you enter an item in order entry or order maintenance that has a *S/H code (Special handling code)* specified for the item offer or SKU offer, you automatically advance to the *Work with Special Handling Screen* or *Work with Custom Special Handling Screen* (depending on the special handling type) unless:
- if the *Suppress S/H window* flag for the additional charge code is set to *Suppress*: The special handling code and any appropriate charges are added to the order

without advancement to a special handling screen. In this situation, you cannot advance to a special handling screen in order entry or order maintenance, although you can display the related screen in standard or streamlined order inquiry.

> **Note:**
>
> The Suppress S/H window flag causes the special handling charge to be added to the order automatically when you use interactive order entry. For example, the charge is not added automatically through the generic order message (order API).

> **Note:**
>
> You should not select the Suppress S/H window flag for a custom special handling format. Adding an item with this setting to an order causes an error in Contact Center order entry.

1. if the *Bypass S/H* flag for the additional charge code is set to *Bypass*: You do not advance automatically to the *Work with Special Handling Screen* or *Work with Custom Special Handling Screen*, although you can display it on demand as described below.

> **Note:**
>
> It is not appropriate to select both the *Suppress S/H window* flag and the *Bypass S/H* flag.

- **By specifying a special handling code when you enter an item:**
- *If no special handling code assigned:* When you enter an item in order entry or order maintenance that does not have a *S/H code (Special handling code)* specified for the item offer or SKU offer, but does have the *Special handling* flag *selected*, you can advance automatically to a special handling screen by specifying the S/H code while entering the item. However, if the *Suppress S/H window* flag is set to *Suppress*, you cannot actually display the special handling screen, as described above.
- *If special handling code is flagged to bypass the screen:* If the *Bypass S/H* flag for the additional charge code is set to *Bypass*, you can still display the screen when you enter the item in order entry or order maintenance by specifying the S/H code while you enter the item.
- **Adding special handling to an existing order detail line:** You can also advance to a special handling screen by:
- Selecting *Handling* for an existing item at the *Work with Order Lines Screen (Adding Items to the Order)*, unless the *Suppress S/H window* flag is set to *Suppress*, as described above.
- Selecting *Change* for an existing item at the *Work with Order Lines Screen (Adding Items to the Order)* to advance to the *Work with Order Line Screen (Changing/Adding an Item)*, then entering the S/H code and, optionally, S/H charge. Again, you cannot display the special handling screen if the *Suppress S/H window* is set to *Suppress*, as described above.

- Selecting *Change* for an existing item at the *Work with Order Lines Screen (Adding Items to the Order)* to advance to the *Work with Order Line Screen (Changing/Adding an Item)*, then selecting *Special Handling*, you have the opportunity to select a special handling code and apply it to the order line, provided the *Special handling* flag *selected*.

Removing special handling information for an order line: If special handling is assigned to an item on an order, you can remove it by:

- If the special handling format is not suppressed, you can select *Handling* for an existing item at the *Work with Order Lines Screen (Adding Items to the Order)* and then select *Delete special handling* or *Delete all* at the special handling screen.
- Otherwise, unless the *Suppress S/H window* is *selected* and the additional charge code specifies a custom special handling format, you can delete the special handling instructions and charge by selecting *Change* for an existing item at the *Work with Order Lines Screen (Adding Items to the Order)* to advance to the *Work with Order Line Screen (Changing/Adding an Item)*, then clearing the S/H code and the S/H charge.
- If the additional charge code is flagged to suppress special handling and uses a custom special handling format, you cannot delete the special handling from the order line. You will need to delete the order line and re-add it.

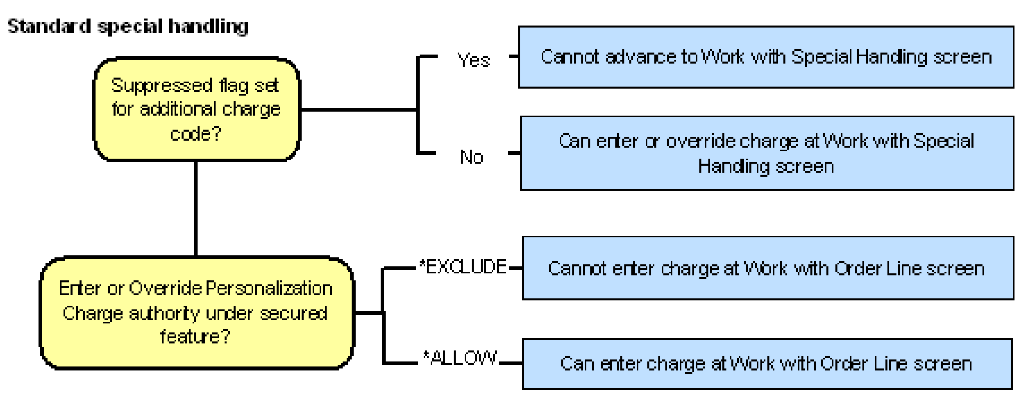
Bypassing or suppressing special handling screens is not supported in Contact Center.

Overriding the Special Handling Charge or Price

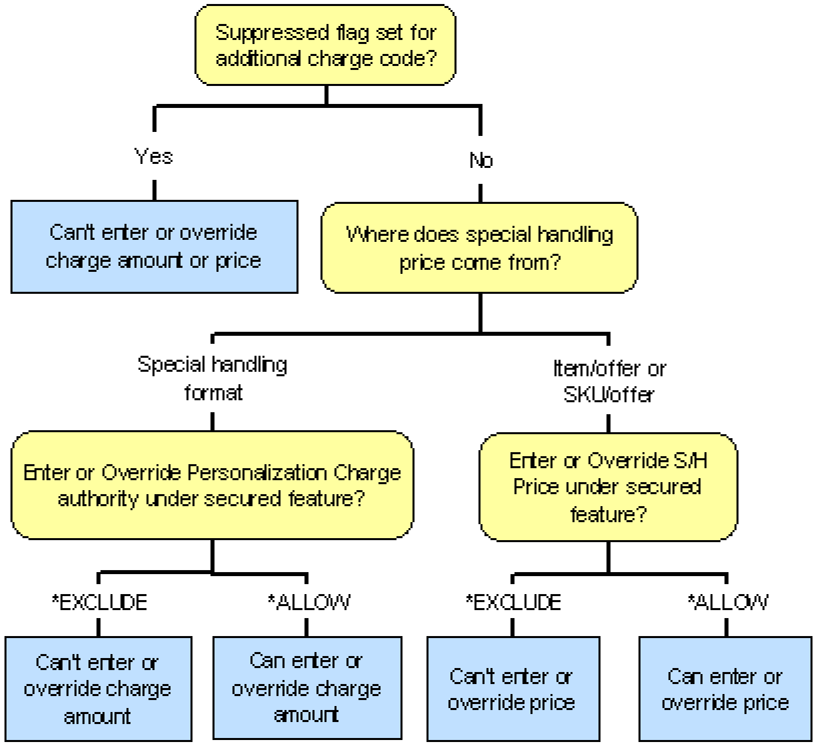
You can enter a special handling price at the special handling screen or the *Work with Order Line Screen* if you have the required authority. Two secured features control access:

- *Enter or Override Personalization Charge (A40)*: Controls access to the Charge field when you are working with custom special handling formats in order entry (when the charge is established at the special handling format)
- *Enter or Override S/H Price (B12)*: Controls access to the S/H price field when you are working with custom special handling formats in order entry (when the special handling price is defined for the item/offer or SKU/offer)

Standard special handling: The following chart summarizes how the system controls access for standard special handling formats:



Custom special handling: The following chart summarizes how the system controls access for custom special handling formats:



Summary: The following table summarizes the situations in which you can enter or override the special handling charge or price:

Screen	You can enter or override special handling charge/price if:
Work with Order Line Screen	Special handling type = standard Authority under the Enter or Override S/H Price secured feature is *ALLOW
Work with Special Handling Screen	Special handling type = standard Display of the special handling screen is not suppressed
Work with Custom Special Handling Screen	Special handling type = custom Display of the special handling screen is not suppressed And: • If the special handling price is derived from the special handling format: authority under the Enter or Override Personalization Charge = *ALLOW; or, • If the special handling price is derived from the item/offer or SKU/offer: authority under the Enter or Override S/H Price secured feature = *ALLOW

Putting a Line on Hold through a Special Handling Format

You can use the *S/H hold* flag for a custom special handling format to automatically put an order line on hold. When you create an order line that uses the special handling format, or apply the special handling format to an existing line, the system puts the order line in hold status.

You can release the order line from hold by:

- removing the special handling from the order line by selecting *Special Handling* at the *Work with Order Line Screen* (**NOTE:** Removing the special handling by selecting *Special Handling* at the *Work with Order Line Screen* will *NOT* release the order line from hold); or,
- changing the special handling format to a format that is not flagged for hold; or,
- using the *Release* option for the order line.

What if the special handling is suppressed? If you select the Suppress flag for the additional charge code associated with the special handling format, you cannot remove the special handling format from an existing order line. You can release the line to remove the hold, or you can delete the line and re-enter it.

Order API: When you create an order through the generic order API rather than interactive order entry, the system also puts the order line in hold status if it uses a special handling format flagged for hold.

> **Note:**
>
> Lines in hold status due to their special handling format are not displayed through the *Working with Held Detail Lines (WOHD)* menu option.

Automatically applying the hold without special handling: You can set up a "dummy" special handling format to automatically place certain items in hold status, even though they do not require any actual special handling. To do so, create a custom special handling format with the *S/H hold* flag selected, but with no details. When you assign the special handling format to an additional charge code, select the Bypass option so that you do not advance automatically to a special handling screen; also, when you assign the additional charge code to the item offer or SKU offer, do not specify a S/H price.

When you add the item to an order through the order API, use the personalization_id in the inbound order message to specify the additional charge code, but do not include any personalization lines in the message.

> **Note:**
>
> To prevent pick slip preparation from sorting the order line with items that require actual special handling, remove the special handling format from the order line; do not use the *Release* option in order maintenance.

Putting a line on hold or releasing the line from hold through a special handling format is not supported in Contact Center.

Work with Additional Charges Screen

Purpose: Use this screen to work with or review additional charge codes, including charges that you use for special handling. See *Establishing Additional Charge Codes (WADC)* for an overview.

How to display this screen: Enter *WADC* in the Fast path field at the top of any menu or select Work with Additional Charges from a menu.

Field	Description
Code	Represents a type of additional charge or credit. Alphanumeric, 2 positions; optional.
Description	The description associated with the additional charge code. Alphanumeric, 30 positions; optional.
Group	Groups similar charge types for reporting purposes. Alphanumeric, 3 positions; optional.
S/H type (Special handling type)	Defines the type of special handling screen the additional charge code calls in order entry. Valid values are: • *Custom* = Custom special handling screen • *Standard* = Standard special handling screen (which includes free-form entry fields) • blank = This additional charge code is not used for special handling. Required.
S/H format (Special handling format)	This code indicates the format of the custom special handling screen for the additional charge code. Special handling format codes are defined in and validated against the Special Handling Format table. See *Establishing Add Reason Codes (WADR)*. Alphanumeric, 2 positions; optional.
U/F	User field; this field is informational only. Alphanumeric, 1 position; optional.

Screen Option	Procedure
Create an additional charge code	Select *Create* to advance to the *Create Additional Charges Screen*.
Change additional charge code information	Select *Change* for a code to advance to the Change Additional Charges screen. You can change any information on this screen except the additional charge code. See *Create Additional Charges Screen* for field descriptions. **Note:** Changing the values in the *S/H type (Special handling type)* and *S/H format (Special handling format)* fields will not affect existing orders.

Screen Option	Procedure
Delete an additional charge code	Select *Delete* for a code. **Note:** You can delete an additional charge code at any time. However, existing orders will retain the code, but not the description.
Display an additional charge code	Select *Display* for a code to advance to the Display Additional Charges screen. You cannot change any information on this screen. See *Create Additional Charges Screen* for field descriptions.

Create Additional Charges Screen

Purpose: Use this screen to create and define the characteristics of an additional charge code.

How to display this screen: Select *Create* at the *Work with Additional Charges Screen*.

Field	Description
Code	Represents the type of additional charges or credits. You may apply additional charges to the source code, to the offer, to special handling of an item, to the item at the ship via level, or you can add them in order entry. Alphanumeric, 2 positions. Create screen: required. Change screen: display-only.
Description	The description associated with the additional charge code. Alphanumeric, 30 positions; required.
Group	Groups similar charge types for reporting purposes. Alphanumeric, 3 positions; optional.

Field	Description
S/H type (Special handling type)	Defines the type of special handling screen that appears in Order Entry or Order Maintenance for the additional charge code. Only additional charge codes with a type of *C* or *S* appear when you scan on the Special Handling field in Order Entry or Order Maintenance. Valid values are: • *Custom* = Custom special handling (entry fields that you can customize). If you enter *Custom*, then you must also enter a value in the *S/H format (Special handling format)* field. • *Standard* = Standard special handling (free-form entry fields) • blank = the additional charge code is not for special handling. **Note:** If you specify a special handling type, you cannot enter a default charge amount, below. This is because the system never uses the default charge amount as part of special handling. Optional.
S/H format (Special handling format)	This code indicates the format of the custom special handling screen. Special handling format codes are defined in and validated against the Special Handling Format table. See *Establishing Custom Special Handling Formats (WSHF)*. You must enter a a format if you entered *Custom* in the *S/H type (Special handling type)* field; otherwise, the system ignores the format entered here if the S/H type field is set to *Standard* or is blank. Alphanumeric, 2 positions; required if S/H type = *Custom*.
S/H exclude tax?	This flag indicates whether special handling charges are subject to normal tax evaluation. Valid values are: • blank = Leave this field blank if the S/H type field is blank, indicating the additional charge code is not for special handling. • *Exclude* = Special handling charges are excluded from any tax, including line handling (*LH*) charges passed from an external tax system. • *Do Not Exclude* = Special handling charges are evaluated for tax, based on the regular tax logic; see *About Tax Rates* for an overview. Selecting this flag is valid only if the additional charge code represents special handling (the S/H type is *Custom* or *Standard*). You cannot select this flag if the additional charge does not represent special handling. Alphanumeric, required if S/H type = *Custom* or *Standard*.
User field	This field is informational only. Alphanumeric, 1 position; optional.

Field	Description
Default charge	The charge (positive amount) or credit (negative amount) to apply to an order when you enter this additional charge code at the Enter Additional Charges pop-up window. The system does not use the default charge in any other situation except through this pop-up window, which is available by selecting *Additional Charges* in order entry, order maintenance, or Work with Return Authorizations. **Note:** You cannot enter both a default charge amount and a special handling type. The *Restrict Additional Charge Amount if Default Charge (F43)* system control value and the Enter Amount for Order Additional Charge Code (A80) secured feature control how this field works. Numeric, 13 positions with a 2-place decimal; optional.
Suppress S/H window	Indicates whether to suppress the display of the *Work with Special Handling Screen* or the *Work with Custom Special Handling Screen* when you add an item with special handling in order entry. You might want to suppress display in order to automatically add a charge to the Handling bucket on an order without requiring the order entry operator to complete or accept the information on the special handling screen. Valid values are: • blank = Leave this field blank if the S/H type field is blank, indicating the additional charge code is not for special handling. • *Suppress* = Suppress the display of the related special handling screen in order entry when you add an item with this additional charge code; however, any related handling charge is still added to the order. • *Do not suppress* = The related special handling screen is available for entry. Not a valid entry for an additional charge code that does not have a Special handling format.

Field	Description
	Additional considerations when suppressing the special handling screens: *Displaying special handling screens on demand:* If the automatic advancement to the special handling screen is suppressed, you cannot display the screen on-demand. For example, a special handling screen is not available by selecting *Special Handling* for an item in order entry or order maintenance. However, you can still advance to the Display Special Handling or the Display Custom Special Handling screens in standard order inquiry, or display special handling information in streamlined order inquiry, regardless of the setting of this field. If you would like to prevent the special handling screen automatically but retain the ability to display it on demand, use the Bypass S/H flag instead of the Suppress S/H window flag. *Entering returns through order entry:* If a special handling format is set to suppress display and applies to the order detail line, then the handling charge will be automatically added to the order as a credit when you create a return by entering a negative quantity in order entry. However, if the special handling format is not set to suppress display, you advance to the special handling screen and have the option of accepting or rejecting the charge. **Note:** This flag causes the special handling charge to be added to the order automatically when you use interactive order entry. For example, the charge is not added automatically through the generic order message (order API). Does not control screen flow in Contact Center. Optional.

Field	Description
Bypass S/H	Indicates whether to bypass the automatic display of the *Work with Special Handling Screen* or the *Work with Custom Special Handling Screen* when you add an item with special handling in order entry; however, you can still display the special handling screen by: • selecting *Special Handling* next to an existing order detail line • entering the code in the S/H field when adding an item to an order • entering the S/H code at the *Work with Order Line Screen (Changing/Adding an Item)* Valid values are: • blank = Leave this field blank if the S/H type field is blank, indicating the additional charge code is not for special handling. • *Bypass* = Bypass automatic display of the special handling screen in order entry or maintenance, but leave the screen available on demand • *Do Not Bypass* = Do not bypass automatic display of the special handling screen in order entry or maintenance Does not control screen flow in Contact Center. **Note:** You should not have both this flag set to *Bypass* and the Suppress S/H window flag set to *Suppress* for an additional charge code in order to have the special handling option work correctly in order entry and order maintenance. Alphanumeric, optional.

Establishing Order Hold Reason Codes (WOHR)

Purpose: Use the Order Hold Reason Code screens to create and maintain reason codes used to place orders on hold, and to set authority to release orders from hold for specific hold reason codes for a user or user class.

The Order Hold Reason table includes:

- system hold reason codes that are delivered with the system and cannot be changed
- reason codes that you can use to place orders on "user hold" in order entry or order maintenance
- reason codes that identify why a credit card order was declined
- reason codes for the system to apply automatically to orders you send to or receive from Order Orchestration (see the *Order Orchestration Integration Overview*)

Reason codes in this table are assigned in Order Entry and Order Maintenance, and are also entered in the Vendor Response table to translate the service bureau decline response code into a user defined reason code. See *Defining Vendor Response Codes*.

You can also assign a hold reason code to an order through the *Generic Pick In API (Shipments, Voids, and Backorders)*.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

In this topic:

- *Work with Order Hold Reason Screen*
- *Create Order Hold Reason Screen*
- *Authority Hierarchy*
- *Work with User Field Authority Screen (Setting Hold Reason Authority for Users)*
  - *Resetting User Authority*
- *Work with User Class Field Authority Screen (Setting Order Hold Reason Authority for User Classes)*
  - *Resetting User Class Authority*

For more information: See *Introducing Order Hold Reason Codes* for a discussion of system-assigned order hold reason codes.

Work with Order Hold Reason Screen

How to display this screen: Enter *WOHR* in the Fast path field at the top of any menu or select Work with Order Hold Reasons from a menu.

Field	Description
Reason	Represents: • a user-defined reason for placing an order on hold in Order Entry or Order Maintenance • a system-defined code used in the credit checking process, • a reason for credit card decline holds Alphanumeric, 2 positions; optional.
Description	The description associated with the hold reason code. Hold reason codes created through the *Generic Pick In API (Shipments, Voids, and Backorders)* have a description of `AB - AUTO CREATED` where the `hold_reason` passed is `AB`. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). **Note:** When you scan, your entry must match a full description exactly. Alphanumeric, 50 positions; optional.

Screen Option	Procedure
Create an order hold reason code	Select *Create* to advance to the *Create Order Hold Reason Screen*.
Change an order hold reason code description	Select *Change* for a hold reason code to advance to the Change Order Hold Reason screen. At this screen, you can change only the description. See *Create Order Hold Reason Screen* for field descriptions. To change the actual reason code, you must delete the existing record, then create a new one.
Delete an order hold reason code	Select *Delete* for a code. **Note:** You can delete an order hold reason code that you created at any time. When you delete a code, the code will still appear on customer order records, but no description will display. You will not be able to remove the order from hold through the Release Held Orders menu option; however, you will be able to release the order from hold in order maintenance by deleting the hold reason code. See *Performing the Release* and *Work with Order Screen in Order Maintenance*.
Display order hold reason code detail	Select *Display* for a hold reason code to advance to the Display Order Hold Reason screen. You cannot change any information on this screen. See *Create Order Hold Reason Screen* for field descriptions.
Work with hold release authority for users	Select *User Release Auth* for a hold reason code to advance to the *Work with User Field Authority Screen (Setting Hold Reason Authority for Users)*.
Work with hold release authority for user classes	Select *User Class Release Auth* for a hold reason code to advance to the *Work with User Class Field Authority Screen (Setting Order Hold Reason Authority for User Classes)*.

Create Order Hold Reason Screen

To create: Use this screen to add an order hold reason code.

How to display this screen: Select *Create* at the *Work with Order Hold Reason Screen*.

Field	Description
Reason	Represents the reason you are placing an order on hold. A reason code may also identify reasons for credit card decline or be a code delivered with the system for use during the credit checking process. Alphanumeric, 2 positions. Create screen: required. Change screen: display-only.
Description	The description associated with the hold reason code. Alphanumeric, 50 positions; required.

Authority Hierarchy

You can use the Work with Order Hold Reason menu option to set user or user class authorities to specific hold reason codes. The settings you enter through this menu option are overrides to defaults set at a higher level.

General guidelines: The order in which the system checks for a user's authority to release an order from hold is described in the table below:

Authority setting	Set up through:
1. user's authority to the specific order hold reason	*Work with User Field Authority Screen (Setting Hold Reason Authority for Users)*
2. user's user class authority to the specific order hold reason	*Work with User Class Field Authority Screen (Setting Order Hold Reason Authority for User Classes)*
3. user's authority to the *Order Hold Reason Release Authority (A77)* secured feature	Work with Secure Feature Authority screen in *Working with User Records (WUSR)*
4. user's user class authority to the *Order Hold Reason Release Authority (A77)* secured feature	Work with User Class Feature Authority screen in *Setting Up User Classes (WUCL)* (also available by selecting *W/W User Classes* in Work with Users)
5. default setting of the *Order Hold Reason Release Authority (A77)* secured feature	Work with Secure Features screen in Work with System Values/Features (fast path = *WSYS*)

The system checks each setting in the above order, skipping over any blank settings until it finds a **ALLOW* or **EXCLUDE* setting.

Example One: User SBROWN is assigned to the user class WAREHOUSE. The *Order Hold Reason Release Authority (A77)* secured feature is set to **ALLOW*. The WAREHOUSE user class authority for order hold reason UH is set to **EXCLUDE*. SBROWN's user authority for order hold reason UH is set to **ALLOW*. The result is that SBROWN can release orders from UH hold, because her user authority overrides the other settings. However, the other users in the WAREHOUSE user class cannot release orders from UH hold, unless they also have an override at the user level.

Example Two: User HBROWN has a *Order Hold Reason Release Authority (A77)* secured feature setting of **EXCLUDE*. However, the user settings for the AA and BB hold reason codes only are set to **ALLOW*. This user is not assigned to a user class. The result is that HBROWN can release orders from AA and BB hold only, but is excluded from releasing an order with any other hold reason code.

Releasing a hold in Contact Center: In the case of the *Order Holds* window in Contact Center, authority to the *Selecting Held Orders (ERHO)* menu option is also required, except for releasing user holds.

For more information:

- releasing an order through order maintenance: *Work with Order Screen in Order Maintenance*
- releasing an order through Release Held Orders: *Performing the Release*

> **Note:**
>
> Order hold reason release authority settings do not prevent a user from releasing an order from recipient hold (available by selecting *Display* for an order through Release Held Orders) or from a pay type hold (available by selecting *User Class Release Auth* for an order in Release Held Orders). The authority settings are effective only for header-level holds.

Work with User Field Authority Screen (Setting Hold Reason Authority for Users)

Purpose: Use this screen to review or change a user's authority to release an order from hold for a specific hold reason code.

> **Note:**
>
> The authority settings are effective only for header-level holds, not for pay type or recipient holds.

How to display this screen: Select *User Release Auth* for a hold reason code at the *Work with Order Hold Reason Screen*.

Field	Description
Hold reason	The hold reason code you selected at the *Work with Order Hold Reason Screen*. The description displays to the right. Code: alphanumeric, 2 positions; display-only. Description: alphanumeric, 50 positions; display-only.
User	The user ID of a person within your company. Alphanumeric, 10 positions; optional.
Name	The user's name. Alphanumeric, 30 positions; optional.

Field	Description
Authority	The user's authority to release an order from the hold reason code specified. Valid values are: • *Allow* = User can release orders with this hold reason code. • *Display* = User can review orders with this hold reason code. • *Exclude* = User cannot release orders with this hold reason code. • blank = User's ability to release orders with this hold reason code depends on the user class setting; if there is no user class setting for this hold reason code, the system checks the setting of the *Order Hold Reason Release Authority (A77)* secured feature at the user, user class, and default levels in order. See *Authority Hierarchy*. Optional.
User class authority	The authority of the user's class to release an order from the hold reason code specified. Valid values are: • *Allow* = User can release orders with this hold reason code, unless the user-level authority is set to *Exclude*. • *Display* = User can review orders with this hold reason code. • *Exclude* = User cannot release orders with this hold reason code, unless the user-level authority is set to *Allow*. • blank = User's ability to release orders with this hold reason code does not depend on the user class setting; if there is no user setting for this hold reason code, the system checks the setting of the *Order Hold Reason Release Authority (A77)* secured feature at the user, user class, and default levels in order. See *Authority Hierarchy*. Alphanumeric, 8 positions; optional.

Resetting User Authority

To delete: Select *Delete* for a user ID.

If you delete a user's user-level authority, the user class-level authority setting for this order hold reason, if any, will be in effect; if there is no user class setting, the system checks the setting of the *Order Hold Reason Release Authority (A77)* secured feature at the user, user class, and default levels in order. See *Authority Hierarchy*.

If the user did not have a user-level authority setting for this order hold reason, the screen does not display an error message; however, no changes take place.

To set to ALLOW: Select *Allow* for a user ID. The user will be able to release orders with this header-level order hold reason.

If the user already had authority to this order hold reason, the screen does not display an error message; however, no changes take place.

To set to EXCLUDE: Select *Exclude* for a user ID. The user will not be able to release orders with this header-level order hold reason.

If the user already is excluded from this order hold reason, the screen does not display an error message; however, no changes take place.

Work with User Class Field Authority Screen (Setting Order Hold Reason Authority for User Classes)

Purpose: Use this screen to review or work with the authority settings to a selected order hold reason by user class.

> **Important:**
>
> The authority settings are effective only for header-level holds, not for pay type or recipient holds.

How to display this screen: Select *User Class Release Auth* for an order hold reason code at the *Work with Order Hold Reason Screen*.

Field	Description
Hold reason	The hold reason code you selected at the *Work with Order Hold Reason Screen*. The description displays to the right. Code: alphanumeric, 2 positions; display-only. Description: alphanumeric, 50 positions; display-only.
Class	A user class within your company. Alphanumeric, 10 positions; optional.
Description	The description of a user class. Alphanumeric, 30 positions; optional.
Authority	The user class's authority to release an order from the hold reason code specified. Valid values are: • *Allow* = User in this class can release orders with this hold reason code, unless the user-level setting is *Exclude*. • *Display* = User in this class can review orders with this hold reason code. • *Exclude* = User in this class cannot release orders with this hold reason code, unless the user-level setting is *Allow*. • blank = User's ability to release orders with this hold reason code depends on the order hold reason setting at the user level, if defined; otherwise, the system checks the secured feature setting at the user, user class, and default levels in order. See *Authority Hierarchy*. Alphanumeric, 8 positions; optional.

Resetting User Class Authority

To delete: Select *Delete* for a user class.

If you delete a user class's authority, and if there is no user-level setting for the order hold reason, the system checks the setting of the *Order Hold Reason Release Authority (A77)* secured feature at the user, user class, and default levels in order. See *Authority Hierarchy*.

If the user class did not have an authority setting for this order hold reason, the screen does not display an error message; however, no changes take place.

To set to ALLOW: Select *Allow* for a user class. The users in this class can release orders with this header-level order hold reason unless the authority setting for an individual user is set to *Exclude*.

If the user class already had authority to this order hold reason, the screen does not display an error message; however, no changes take place.

To set to EXCLUDE: Select *Exclude* for a user class. The users in this class will not be able to release orders with this header-level order hold reason unless the authority setting for an individual user is set to *Allow.*

If the user class already is excluded from this order hold reason, the screen does not display an error message; however, no changes take place.

Establishing Cancel Reason Codes (WCNR)

Purpose: Use the Cancel Reason Code screens to create and maintain reason codes for item, order, or quote cancellations. You must establish at least one cancel reason code, because order maintenance requires that you enter a cancel reason code when you cancel an order or quote or reduce the quantity ordered. Additionally, the system uses cancel reason codes for automatic backorder cancellations, such as the cancellation of:

- the balance of an order after its first shipment
- backordered items after a specified number of days
- an item from all orders that contain the item (for example, soldout items)

Updates: When you cancel an entire order and enter a cancel reason code, the system assigns the reason code to each open (unshipped) item on the order.

The Cancel Reason table stores history on cancellations by offer, and the system writes transactions to the Order History table whenever you perform a cancellation.

The system also writes cancel reason information to the Refund table for prepaid orders. Prepaid orders include orders paid by check or cash.

Prevent refund? You might designate whether to generate refunds for a cancel reason code, such as when you cancel fraudulent orders. When you use a cancel reason code flagged to prevent a refund, the refund record is still generated, but in a *Cancel Pending* status. The next time you use *Processing Refunds (MREF)*, the refund is canceled.

Reduce demand? If the cancel reason code is not flagged to reduce demand, and you cancel all items on the order, the order status is set to *Canceled*; otherwise, if the cancel reason code is flagged to reduce demand, or any items have shipped, the order status is set to *Closed*.

In this topic:

- *Work with Cancel Reason Codes Screen*
- *Create Cancel Reason Screen*
- *Display Reason/Offer Screen (Cancel Reason History)*

Work with Cancel Reason Codes Screen

How to display this screen: Enter *WCNR* in the Fast path field or select Work with Cancel Reasons from a menu.

Field	Description
Rsn (Cancel reason)	Represents a reason for canceling an order or item. Numeric, 2 positions; optional.
Description	The description associated with the cancel reason code. Alphanumeric, 30 positions; optional.
Refund	Controls whether a refund will be generated for orders or quantities canceled with the cancel reason code. Valid values are: • *Generate Refund with Release Status* = Generate a refund. • *Generate Refund with Hold Status* (default*) or blank* = Generate a refund, but place it on hold. • *Do Not Generate a Refund* = The refund record is still generated, but in a *Cancel Pending* status. The next time you use *Processing Refunds (MREF)*, the refund is canceled. Optional.
Reduce	Indicates whether the system decreases demand figures for cancellations using this cancel reason code. Demand represents the quantity ordered (but not necessarily shipped). Valid values are: • *Yes* = Reduce demand by the quantity canceled. The line status and order status is set to *Closed*. • *No* or blank = Do not reduce demand. The line status is set to *Canceled*. If you cancel all the items on the order with a cancel reason flagged not to reduce demand, the order status is set to *Canceled*; otherwise, it is set to *Closed*. Optional.

Screen Option	Procedure
Create a cancel reason code	Select *Create* to advance to the *Create Cancel Reason Screen*.
Change a cancel reason code	Select *Change* for a cancel reason to advance to the Change Cancel Reason screen. See *Create Cancel Reason Screen* for field descriptions. You can change any information on this screen except the cancel reason code.
Delete a cancel reason code	Select *Delete* for a cancel reason code. If the cancel reason code has been used to cancel one or more orders, a pop-up window indicates that history information exists and requires confirmation. The Cancel Reason History record includes information about the number and dollar value of cancellations for that cancel reason by offer. See *Display Reason/Offer Screen (Cancel Reason History)*. You will lose this history if you delete the cancel reason code.

Screen Option	Procedure
Display a cancel reason code	Select *Display* for a cancel reason code to advance to the Display Cancel Reason screen. You cannot change any information on this screen. See *Create Cancel Reason Screen* for field descriptions.
Display cancel reason history by offer	Select *Display Offer* for a cancel reason code to advance to the Display Cancel Reason/Offer screen. See *Display Reason/Offer Screen (Cancel Reason History)*.

Create Cancel Reason Screen

To create: Use this screen below to create a cancel reason code.

How to display this screen: Select *Create* at the *Work with Cancel Reason Codes Screen*.

Field	Description
Cancel reason code	Represents a reason for canceling an order or a quantity on the order. Numeric, 2 positions. Create screen: required. Change screen: display-only.
Description	The description associated with the cancel reason code. Alphanumeric, 30 positions; required.
Generate refund?	Controls whether a refund will be generated for orders or quantities canceled with the cancel reason code. Valid values are: • *Generate Refund with Release Status* = Generate a refund. • *Generate Refund with Hold Status* (default*) or blank* = Generate a refund, but place it on hold. • *Do Not Generate a Refund* = The refund record is still generated, but in a *Cancel Pending* status. The next time you use *Processing Refunds (MREF)*, the refund is canceled. Optional.
Reduce demand	This flag indicates whether the system decreases demand figures (quantity ordered) for dollar value of orders when you cancel a line using the cancel reason code. Demand figures are tracked in the Source table (*MSSRC*) as well as the other tables listed under *Demand Updates: Affected Tables*. Valid values are: • *Selected* = Reduce demand by the quantity canceled. One reason to reduce demand is if the operator made a keying error when entering the quantity. Using a cancel reason code with this setting *selected* changes the status of lines or orders to closed and reduces the quantity ordered on the order line to zero. When you use a cancel reason code with this setting *selected*, and system control value *Update Demand for Order Maintenance Transactions (C72)* is also *selected*, the system decreases the dollar value of orders, but does not change the dollar value or number of cancellations in the Source table (*MSSRC*).

Field	Description
	1. *Unselected* (default) = Do not reduce demand. Using a cancel reason code with this setting *unselected* changes the status of lines to canceled but does not change the quantity ordered. If you cancel the entire order with a reason code that is not set to reduce demand, the order status is also set to canceled. When you use a cancel reason code with this field *unselected*, and system control value *Update Demand for Order Maintenance Transactions (C72)* is *selected*, the system increases the dollar value and the number of cancellations but does not change the dollar value of orders in the Source table (*MSSRC*) and other tables listed under *Demand Updates: Affected Tables*.

Display Reason/Offer Screen (Cancel Reason History)

Purpose: Use this screen to display history by offer for a cancel reason code.

How to display this screen: At the *Work with Cancel Reason Codes Screen*, select *Display Offer* for a cancel reason code.

How to interpret this screen: This screen displays cancellation history associated with the reason code. Behind each reason code is the Cancel Reason/Offer table, which includes the number of orders and dollars canceled for the reason code.

Updates when? The system updates the History table when you accept a cancellation through Order Maintenance, provided the cancel reason code is not flagged to Reduce Demand.

This screen displays summary data by offer, with cancel counts and dollars for each date when items were canceled. Summaries are listed by offer, then by date. You cannot change any information on this screen.

Field	Description
Cancel reason code	Represents a reason for canceling an order or a quantity on an order. This is the code you selected at the *Work with Cancel Reason Codes Screen*. Numeric, 2 positions; display-only.
Offer	A code representing a catalog, space or television advertisement from which you accept orders. Offer codes are defined in and validated against the Offer table. See *Working with Offers (WOFR)*. Alphanumeric, 3 positions; optional.
Date	The date when the cancellation(s) occurred. Numeric, 6 positions (in user date format); optional.
# cancels	The number of cancellations performed manually or automatically. Numeric, 3 positions; display-only, updated by the system.
# units	The total number of units canceled. Numeric, 3 positions; display-only, updated by the system.
$ cancels (Dollars canceled)	The total merchandise dollars canceled. Numeric, 13 positions with a 2-place decimal; display-only, updated by the system.

Establishing Return Reason Codes (WRTR)

Purpose: Use the Return Reason Code screens to create and maintain reason codes for merchandise returns. You must establish at least one return reason code for receipt and credit of returned merchandise. When you enter returns through return authorizations, order entry, or order maintenance, or when the customer creates a return authorization at the web storefront, a return reason code is required.

The Return Reason table stores history on returns by offer, and the system writes transactions to the Order History table whenever you perform a return. The system also writes return reason history to the Refund table for customer credit.

Download to web storefront: You can download return reason codes to the web storefront if you enable customers to create return authorizations on the storefront.

Uploading: You can use the *Submit Supporting Data Upload Screen (SDUP)* to upload new return reason codes. See *Importing Item-Related Supporting Data (SDUP)* for an overview.

Report: You can use the *Return Reason Report* to review the total number of units and dollars returned for a selected time period. See *Printing the Return Reason Report (PRRR)* for more information.

For more information: See *Introducing Return Authorizations (WRTA)* for an overview on returns.

In this topic:

- *Work with Return Reason Screen*
- *Create Return Reason Screen*
- *Display Return Reason/Offer Screen (Reviewing History)*

Work with Return Reason Screen

How to display this screen: Enter *WRTR* in the Fast path field or select Work with Return Reason from a menu.

Field	Description
Rsn (Return reason)	Represents a reason for returning an item. Numeric, 3 positions; optional.
Description	The description associated with the return reason code. Alphanumeric, 30 positions; optional.
Def (Defective)	Indicates whether the return is defective. This field is informational only. Valid values: • *Yes* = The item is defective. • *No* (default) = The item is not defective.
Rtv (Return to vendor)	Indicates whether you send the returned merchandise back to the vendor. Valid values: 1. *Yes* = Send the returned merchandise to the vendor. 2. *No* (default) = Do not send the returned merchandise back to the vendor.

Field	Description
Whs (Warehouse)	Represents a warehouse to receive the returned merchandise. Warehouse codes are defined in and validated against the Warehouse table. Numeric, 3 positions; optional.

Screen Option	Procedure
Create a return reason code	Select *Create* to advance to the *Create Return Reason Screen*.
Change a return reason code	Select *Change* for a code to advance to the Change Return Reason screen. You can change any information except the return reason code. See *Create Return Reason Screen* for field descriptions. To change the actual code, delete the record and create a new one.
Delete a return reason code	Select *Delete* for a code to delete it. If the return reason code has been used to return one or more items, a pop-up window indicates that history exists and requires confirmation. You will lose this history if you delete the return reason code.
Display return reason code detail	Select *Display* for a code to advance to the Display Return Reason screen. You cannot change any information on this screen. See *Create Return Reason Screen* for field descriptions.
Display return reason history by offer	Select *Display Offers* for a code to advance to the *Display Return Reason/Offer Screen (Reviewing History)*.

Create Return Reason Screen

To create: At the *Work with Return Reason Screen*, select *Create*.

Field	Description
Return reason code	Represents a reason for returning merchandise. Numeric, 3 positions. Create screen: required. Change screen: display-only.
Description	The description associated with the reason code. Alphanumeric, 30 positions; required.
Defective?	This flag indicates whether the item is defective. This setting is informational only. Valid values: • *Selected* = The item is defective. • *Unselected* (default) = The item is not defective.

Field	Description
Return to vendor	This flag indicates whether you send the returned merchandise back to the vendor. Valid values: • *Selected* = Send the returned merchandise to the vendor. • *Unselected* (default) = Do not send the returned merchandise back to the vendor.
Warehouse	Represents the warehouse to receive the returned merchandise. This field is not currently implemented; the warehouse is determined by the return disposition value used on the return. See *Establishing Return Disposition Values (WRDV)*. Numeric, 3 positions; optional.

Display Return Reason/Offer Screen (Reviewing History)

Purpose: Use this screen to display return history by offer for a reason code.

How to display this screen: At the *Work with Return Reason Screen*, select *Display Offers* for a return reason.

How to interpret this screen: This screen displays return history associated with a reason code. Behind each reason code is a history table that indicates the number of items and dollars returned for the reason code. The History table matches each return with an offer (for example, a catalog) and the date of the return transaction.

About returns: The system updates this history each time you complete the return processing (that is, credit the return). Processing a return involves creating the return authorization, receiving the return into inventory, and processing the credit so that you can refund the customer, if necessary. When you process a return in order entry or order maintenance, these three steps occur at once “behind the scenes.” You can also break this process out into the three separate steps when you process returns through the e-commerce interface or the return authorizations options. See *Introducing Return Authorizations (WRTA)*.

The information on this screen changes whenever the history table is updated. This screen displays summary data with return counts and dollars for each date on which item returns were processed. Summaries are listed by offer, then by date. You cannot change any of the information on this screen.

Field	Description
Return reason code	Represents a reason for returning merchandise. Numeric, 3 positions; display-only.
Offer	Represents a catalog, space or television advertisement from which you accept orders. Offer codes are defined in and validated against the Offer table. See *Working with Offers (WOFR)*. Alphanumeric, 3 positions; optional.
Date	The date when the return processing was completed. Numeric, 6 positions (in user date format); optional.
Number	The number of units returned and credited. Numeric, 3 positions; display-only.
Dollars	The total value of returned merchandise. Alphanumeric, 13 positions with a 2-place decimal; display-only.

Establishing Exchange Reason Codes (WEXR)

Purpose: Use the Exchange Reason Code screens to create and maintain reason codes for merchandise exchanges. The Return Authorization and Order Maintenance functions require an exchange reason code when you exchange merchandise.

The Exchange Reason table stores history by offer, and the system writes transactions to the Order History table whenever you perform an exchange.

Uploading: You can use the *Submit Supporting Data Upload Screen (SDUP)* to upload new exchange reason codes. See *Importing Item-Related Supporting Data (SDUP)* for an overview.

Report: You can use the *Exchange Reason Report* to review the total number of units and dollars returned for exchange in a selected time period. See *Printing the Exchange Reason Report (PERR)* for more information.

In this topic:

- *Work with Exchange Reason Screen*
- *Create Exchange Reason Screen*
- *Display Exchange Reason/Offer Screen (Reviewing History)*

Work with Exchange Reason Screen

How to display this screen: Enter *WEXR* in the Fast path field or select Work with Exchange Reasons from a menu.

Field	Description
Rsn (Exchange reason code)	Represents a reason for exchanging merchandise. Numeric, 3 positions; optional.
Description	The description associated with the exchange reason code. Alphanumeric, 30 positions; optional.
Def (Defective)	Indicates whether the merchandise returned for exchange is defective or damaged. Valid values: • *Yes* = The merchandise is defective. • *No* = The merchandise is not defective. Optional.
Rtv (Return to vendor)	Indicates whether you send the returned merchandise back to the vendor. Valid values: • *Yes* = Return the merchandise to the vendor. • *No* = Do not return the merchandise to the vendor. Optional.
Whs (Warehouse)	Represents a warehouse. Numeric, 3 positions; optional.

Screen Option	Procedure
Create an exchange reason code	Select *Create* to advance to the *Create Exchange Reason Screen*.
Change an exchange reason code	Select *Change* for a code to advance to the Change Exchange Reason screen. See *Create Exchange Reason Screen* for field descriptions. To change the reason code, delete the record and create a new one.
Delete an exchange reason code	Select *Delete* for a code. If the exchange reason code has been used to exchange one or more items, a pop-up window indicates that there is history for the exchange reason code, containing information on number and dollar value of returns for that return reason by offer. See *Display Exchange Reason/Offer Screen (Reviewing History)*. You will lose this history if you delete the exchange reason code.
Display an exchange reason code	Select *Display* for a code to advance to the Display Exchange Reason screen. You cannot change any information on this screen. See *Create Exchange Reason Screen* for field descriptions.
Display exchange reason code history by offer	Select *Display Offers* for a code to advance to the *Display Exchange Reason/Offer Screen (Reviewing History)*.

Create Exchange Reason Screen

To create: At the *Work with Exchange Reason Screen*, select *Create*.

Field	Description
Exchange reason code	Represents a reason for exchanging merchandise. Numeric, 3 positions. Create screen: required. Change screen: display-only.
Description	The description associated with the exchange reason code. Alphanumeric, 30 positions; required.
Defective	Indicates whether the returned item is defective or damaged. Valid values: • *Selected* = The merchandise is defective. • *Unselected* (default) = The merchandise is not defective.
Return to vendor?	Indicates whether to return the merchandise back to the vendor. Valid values: • *Selected* = Return the merchandise to the vendor. • *Unselected* (default) = Do not return the merchandise to the vendor.

Field	Description
Warehouse	Represents the warehouse to receive the returned merchandise. Warehouse codes are defined in and validated against the Warehouse table. This field is not currently implemented; the warehouse is determined by the return disposition value used on the return. See Establishing Return Disposition Values (WRDV). Numeric, 3 positions; optional.

Display Exchange Reason/Offer Screen (Reviewing History)

Purpose: Use this screen below to display exchange reason/offer records.

How to display this screen: At the *Work with Exchange Reason Screen*, select *Display Offers* for an exchange reason code.

How to interpret this screen: This screen displays exchange history associated with a reason code.

Behind each reason code is a History table that indicates the number of units and dollar total in exchanges for the code. The system updates this History table whenever you accept an exchange through Order Maintenance or Return Authorization. The History table matches each exchange with an offer (for example, a catalog) and the date of the exchange transaction.

The information on this screen changes whenever the History table is updated. This screen displays summary data with exchange counts and dollars for each date on which exchanges were processed. Summaries are listed by offer, then by date. You cannot change any information on this screen.

Field	Description
Exchange reason code	Represents a reason for exchanging merchandise. Numeric, 3 positions; display-only.
Offer	Represents a catalog, space or television advertisement from which you accept orders. Offer codes are defined in and validated against the Offer table. See *Working with Offers (WOFR)*. Alphanumeric, 3 positions; optional.
Date	The date when the exchange transaction occurred. Numeric, 6 positions (in user date format); display-only.
Number	The number of units exchanged. Numeric, 3 positions; optional.
Dollars	The value of exchanged merchandise. Numeric, 13 positions with a 2-place decimal; display-only.

Establishing Return Disposition Values (WRDV)

Purpose: Use return disposition values to identify how a returned item will be handled by the system when you process a return through Return Authorizations, Order Entry or Order Maintenance.

- *Does the return affect inventory?* If the return disposition code affects inventory, the merchandise will be returned into active inventory and the system updates the on hand quantity for the specified location.
- *Is the merchandise returned to its primary location?* The system checks for a primary location and warehouse in the Item table. If a location and warehouse is defined in the Item table, the system returns the item automatically to this warehouse location. If a location has not been defined in the Item table or if the return disposition value is not set up to receive returns to the primary location, the system receives the return in the warehouse and location defined for the return disposition value.
- *Does the user have authority to this return disposition value?* You can set up authority to a specific return disposition value for a user or user class. If the user has authority to the return disposition code, the system processes the return. If the user does not have authority to the return disposition value, an error message indicates when you try to process the return.

In this topic:

Work with Return Disposition Values Screen

How to display this screen: Enter *WRDV* in the Fast path field at the top of a menu or select Work with Return Disposition Values from a menu.

Field	Description
Return code	A code that identifies how the returned merchandise will be handled by the system, in terms of whether the return updates inventory and the warehouse and location to which the merchandise will be returned. Alphanumeric, 2 positions; optional.
Description	The description of the return disposition value. Alphanumeric, 30 positions; optional.
Affect inv (Affect inventory)	Determines whether the return affects the on-hand quantity. Valid values: • *Yes* = Affect inventory. When set to *Yes*, you must enter a valid warehouse and location even if the **Use primary location** = Y. • *No* = Do not affect inventory. Optional.

Field	Description
Use primary location	Indicates whether the item should be returned to its primary location. Valid values: • *Yes* = Use primary. • *No* = Do not use primary. Optional.
W/H (Warehouse)	A code that identifies the warehouse where the item will be returned. Warehouse codes are defined in and validated against the Warehouse table. See *Creating and Maintaining Warehouses (WWHS)*. Numeric, 3 positions; optional.
Location	A code that identifies the location within the warehouse where you place the item. Location codes are defined in and validated against the Location table. See *Creating and Maintaining Locations (WLOC)*. Alphanumeric, 7 positions; optional.

Screen Option	Procedure
Create a return disposition code	Select *Create* to advance to the *Create Return Disposition Screen*.
Change return disposition information	Select *Change* for a return disposition value to advance to the Change Return Disposition screen. You can change any information on the Change Return Disposition screen except the disposition code itself. See *Create Return Disposition Screen* for field descriptions. To change the actual disposition code, you must delete the existing record and create a new one.
Delete a return disposition code	Select *Delete* for a return disposition value.
Display a return disposition code	Select *Display* for a return disposition value to advance to the Display Return Disposition screen. You cannot change any information on this screen. See *Create Return Disposition Screen* for field descriptions.
Work with return disposition authority for users	Select *User Authority* for a return disposition value to advance to the *Work with User Field Authority Screen (Return Disposition Authority for Users)*.
Work with return disposition authority for user classes	Select *User Class Authority* for a return disposition value to advance to the *Work with User Class Field Authority Screen (Return Disposition Authority for User Classes)*.

Create Return Disposition Screen

Purpose: Use this screen to create a return disposition value.

How to display this screen: At the *Work with Return Disposition Values Screen*, select *Create*.

Field	Description
Code	Represents the return disposition value. Return disposition values identify how returned merchandise will be handled by the system, in terms of whether the return updates inventory and the warehouse and location to which the merchandise will be returned. Alphanumeric, 2 positions. Create screen: required. Change screen: display-only.
Description	The description of the return disposition value. Alphanumeric, 30 positions; required.
Affect inventory	This flag identifies whether the returned merchandise will be returned into active inventory and update the on hand quantity in the specified location. Valid values are: • *Selected* = Returned merchandise increases the on-hand quantity. • *Unselected* = Returned merchandise does not increase the on-hand quantity. **Note:** If you *deselect* this setting, you must *deselect* the *Use primary location* setting. Also, you cannot enter values in the *Warehouse* or *Location* fields or the system displays the following message: `Warehouse & location not required for Disp. code .`
Use primary location	This flag indicates whether to return items to their primary locations. Valid values are: • *Selected* = Return the item to the primary location. If the disposition code is set up to affect inventory and return to the primary location, the system checks for a primary location in the Item table. If one is available, the system returns the item automatically to this warehouse location. If one is not available, the system receives the return in the warehouse and location defined for the return disposition code. • *Unselected* = Do not return the item to the primary location; instead, return the item to the warehouse and location defined for the Return Disposition code.

Field	Description
Warehouse	The default warehouse used for returns with this Return Disposition code. You must define a default warehouse if you *selected* the *Affect inventory* field. **Note:** The system uses this warehouse automatically if the *Use primary location* field is *selected*, but no primary warehouse is defined for the item/SKU. Warehouse codes are defined in and validated against the Warehouse table. See *Creating and Maintaining Warehouses (WWHS)*. Numeric, 3 positions; required when Affect inventory field is *selected*.
Location	The default location used for returns with this Return Disposition code. You must define a default location if you *selected* the *Affect inventory* flag. **Note:** The system uses this location automatically if the *Use primary location* field is *selected*, but no primary location is defined for the item/SKU. Location codes are defined in and validated against the Location table. See *Creating and Maintaining Locations (WLOC)*. Alphanumeric, 7 positions; required when Affect inventory field is *selected*.

Authority Hierarchy

Purpose: You can use the Work with Return Disposition Values menu option to set user or user class authorities to specific return disposition values. The settings you enter through this menu option are overrides to defaults set at a higher level.

General guidelines:

Authority Setting	Set Up Through:
1. user's authority to the specific return disposition value	*Work with User Field Authority Screen (Return Disposition Authority for Users)*
2. user's user class authority to the specific return disposition value	*Work with User Class Field Authority Screen (Return Disposition Authority for User Classes)*

Authority Setting	Set Up Through:
3. user's authority to the Return Disposition Code Authority (A83) secured feature	*Work with User Class Field Authority Screen (Return Disposition Authority for User Classes)* in Work with User Classes (fast path = *WUCL*); also available by selecting *W/W User Classes* in Work with Users
4. user's user class authority to the Return Disposition Code Authority (A83) secured feature	*Work with User Class Field Authority Screen (Return Disposition Authority for User Classes)* in Work with User Classes (fast path = *WUCL*); also available by selecting *W/W User Classes* in Work with Users
5. default setting of the Return Disposition Code Authority (A83) secured feature	Work with System Features screen in Work with System Values/Features (fast path = *WSYS*)

The system checks each setting in the above order, skipping over any blank settings until it finds a *Allow* or *Exclude* setting.

Example One: User BMIRANDA is assigned to the user class WAREHOUSE. The Return Disposition Code Authority (A83) secured feature is set to *Allow*. The WAREHOUSE user class authority for return disposition value 4A is set to *Exclude*. BMIRANDA's user authority for return disposition value 4A is set to *Allow*. The result is that BMIRANDA can process a return using the 4A return disposition value, because her user authority overrides the other settings. However, the other users in the WAREHOUSE user class cannot process a return user the 4A return disposition value, unless they also have an override at the user level.

Example Two: User TBROWN has a Return Disposition Code Authority (A83) secured feature setting of *Exclude*. However, the user settings for the 4A and 4B return disposition values only are set to *Allow*. This user is not assigned to a user class. The result is that TBROWN can process a return using return disposition values 4A and 4B only, but is excluded from processing a return using any other return disposition values.

Work with User Field Authority Screen (Return Disposition Authority for Users)

Purpose: Use this screen to review or change a user's authority to a specific return disposition value.

How to display this screen: Select *User Authority* for a return disposition value at the *Work with Return Disposition Values Screen*.

Field	Description
Return disposition	The return disposition value you selected at the *Work with Return Disposition Values Screen*. The description displays to the right. Value: alphanumeric, 2 positions; display-only. Description: alphanumeric, 30 positions; display-only.
User	The user ID of a person within your company. Alphanumeric, 10 positions; optional.
Name	The user's name. Alphanumeric, 30 positions; optional.

Field	Description
Authority	The user's authority to process a return using the return disposition value specified. Valid values are: • *Allow* = The user can process a return using this return disposition value. • *Display* = The user can review a return with this return disposition value. • *Exclude* = The user cannot process a return using this return disposition value. • Blank = The user's ability to process a return using this return disposition value depends on the user class setting; if there is not user class setting for this return disposition value, the system checks the setting of the Return Disposition Code Authority (A83) secured feature at the user, user class, and default levels in order. See *Authority Hierarchy*. Optional.
User class authority	The authority of the user's class to process a return using the return disposition value specified. Value values are: • *Allow* = The user can process a return using the return disposition value specified, unless the user-level authority is set to *Exclude*. • *Display* = The user can review a return with the return disposition value specified. • *Exclude* = The user cannot process a return using the return disposition value specified, unless the user-level authority is set to *Allow*. • Blank = The user's ability to process a return using the return disposition value specified does not depend on the user class setting; if there is not user setting for this return disposition value, the system checks the setting of the Return Disposition Code Authority (A83) secured feature at the user, user class, and default levels in order. See *Authority Hierarchy*. Optional.

Resetting User Authority

To delete: Select *Delete* for a user ID.

If you delete a user's user-level authority, the user class-level authority setting for this return disposition value, if any, will be in effect; if there is no user class setting, the system checks the setting of the Return Disposition Code Authority (A83) secured feature at the user, user class, and default levels in order. See *Authority Hierarchy*.

If the user did not have a user-level authority setting for this return disposition value, the screen does not display an error message; however, no changes take place.

Set to ALLOW: Select *Allow* for a user ID. The user will be able to process a return using the specified return disposition value.

If the user already had authority to this return disposition value, the screen does not display an error message; however, no changes take place.

Set to EXCLUDE: Select *Exclude* for a user ID. The user will not be able to process a return using this return disposition value.

If the user already is excluded from this return disposition value, the screen does not display an error message; however, no changes take place.

Work with User Class Field Authority Screen (Return Disposition Authority for User Classes)

Purpose: Use this screen to review or work with the authority settings to a selected return disposition value by user class.

How to display this screen: Select *User Class Authority* for a return disposition value at the *Work with Return Disposition Values Screen*.

Field	Description
Return disposition	The return disposition value you selected at the *Work with Return Disposition Values Screen*. The description displays to the right. Value: alphanumeric, 2 positions; display-only. Description: alphanumeric, 30 positions; display-only.
Class	A user class within your company. Alphanumeric, 10 positions; optional.
Description	The description of a user class. Alphanumeric, 30 positions; optional.
Authority	The user class's authority to process a return using the return disposition code specified. Valid values are: • *Allow* = User in this class can process a return using this return disposition value, unless the user-level setting is *Allow*. • *Display* = User in this class can review a return using this return disposition value. • *Exclude* = User in this class cannot process a return using this return disposition value, unless the user-level setting is *Exclude*. • blank = User's ability to process a return using this return disposition value depends on the return disposition value setting at the user level, if defined; otherwise, the system checks the secured feature setting at the user, user class, and default levels in order. See *Authority Hierarchy*. Optional.

Resetting User Class Authority

To delete: Select *Delete* for a user class.

If you delete a user class's authority, and if there is no user-level setting for the return disposition value, the system checks the setting of the Return Disposition Code Authority (A83) secured feature at the user, user class, and default levels in order. See *Authority Hierarchy*.

If the user class did not have an authority setting for this return disposition value, the screen does not display an error message; however, no changes take place.

To set to ALLOW: Select *Allow* for a user class. The user in this user class will be able to process a return using this return disposition value, unless the authority setting for an individual user is set to *Exclude*.

If the user class already had authority to this return disposition value, the screen does not display an error message; however, no changes take place.

Set to EXCLUDE: Select *Exclude* for a user class. The users in this class will not be able to process a return using this return disposition value, unless the authority setting for an individual user is set to *Allow*.

If the user class already is excluded from this return disposition value, the screen does not display an error message; however, no changes take place.

Establishing Custom Special Handling Formats (WSHF)

Purpose: Use the Special Handling Format table to define the contents of the custom special handling screen that displays in Order Entry. Custom special handling differs from standard special handling in that you can define required fields, offer additional features with a special charge, and specify valid values for input fields that the system will validate in Order Entry.

Overview: To display the custom special handling screen in Order Entry, you must first define the format. You then associate the format with an additional charge code. You can then define that additional charge code for the Item/Offer or Item/SKU/Offer.

See *Special Handling Overview* for more information on how special handling works.

Setup: There are three basic steps to setting up a custom special handling format:

1. Select *Create* on the *Work with Special Handling Format Screen* to define the new format.
2. Select *Work with details* for the new format to define the fields to display in Order Entry, then select *Create* to create each field.
3. Enter valid responses for each field that you want the system to validate in Order Entry. Later, you can designate a default response by using the Change option on the *Work with Special Handling Format Detail Screen*.

Suppressing screen display in order entry: You can use the *Suppress S/H window* for the additional charge code to prevent the *Work with Custom Special Handling Screen* from opening automatically in order entry. You might want to suppress display in order to automatically add a charge to the Handling bucket on an order without requiring the order entry operator to complete or accept the information on the special handling screen.

Sending custom special handling instructions in the order API: See the *personalization_line* element in the CWOrderIn message for information on how to pass custom special handling instructions through the order API in the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

In this topic:

- *Work with Special Handling Format Screen*
- *Create Special Handling Format Screen*
- *Work with Special Handling Format Detail Screen*
- *Create Special Handling Format Detail Screen*
- *Work with Special Format Response Screen*
- *Work with Special Format Rules Screen*

For more information:

- *Special Handling Overview*

- associating a custom special handling format with an additional charge code or suppressing the display of the special handling screen in order entry: *Establishing Additional Charge Codes (WADC)*
- working with item offers and item/SKU offers: *Performing Initial Item Entry (MITM)*
- system control values that affect special handling:
  - *Enter Custom Special Handling in Upper and Lower Case (D65)*
  - *Generate Custom Special Handling File (D66)*
  - *Evaluate Special Handling Charges by Order Line (D67)*
  - *Tax on Handling (B15)*
  - *Display Special Format Response Descriptions in Order Entry (E90)*
  - *Include Spaces in Special Handling Edit for Maximum Characters (F80)*
- Secured features:
  - *Enter or Override Personalization Charge (A40)*
  - *Enter or Override S/H Price (B12)*
- entering an item with custom special handling on an order: *Work with Special Handling Screen*

Work with Special Handling Format Screen

How to display this screen: Enter *WSHF* in the Fast path field at the top of any menu, or select Work with Special Handling Format from a menu.

Field	Description
Code	This code identifies the special format. Alphanumeric, 2 positions; optional.
Description	The description of the special format. Alphanumeric, 30 positions; optional.
Status	A code used to indicate whether the special format is active. Valid codes are: • *Active* • *Inactive* The system issues a message in Order Entry when you enter an item that uses an inactive special handling format and it will not accept the item on the order. Required.

Field	Description
Extract	Controls whether the system will include items to receive this type of special handling in extract files. If an outside service performs special handling for you, you might want to use these tables to transmit the information to them. The system generates these tables when you generate pick slips. In order to generate the tables for custom special handling items, both this field and the *Generate Custom Special Handling File (D66)* system control value must be *selected*. Valid values: • *Yes* = Include items to receive this type of special handling in the custom special handling extract. • *No* = Do not include items to receive this type of special handling in the custom special handling extract. Optional.
Hold	Indicates whether to automatically put an order line on hold when it uses this special handling format. *YES* = When you create an order line using this format, or apply this format to an existing order line, the system puts the order line on hold. *NO* = The system does not automatically put an order line on hold when it uses this special handling format. See *Putting a Line on Hold through a Special Handling Format*.

Screen Option	Procedure
Create a special handling format	Select *Create* to advance to the *Create Special Handling Format Screen*.
Change a special handling format	Select *Change* for a special handling format to advance to the Change Special Handling Format screen. You can change any information on this screen except the format code. See *Create Special Handling Format Screen* for field descriptions. You can change or delete a special handling format at any time without affecting existing orders.
Delete a special handling format	Select *Delete* for a special handling format.
Display a special handling format	Select *Display* for a special handling format to advance to the Display Special Handling Format screen. You cannot change any information on this screen. See *Create Special Handling Format Screen* for field descriptions.
Change, delete, display or create the actual screen format, or define appropriate responses for fields on the custom special handling screen	Select *Work with details* for a special handling format to advance to the *Work with Special Handling Format Detail Screen*.

Create Special Handling Format Screen

Purpose: At this screen, you can create and define the characteristics of a custom special handling screen.

How to display this screen: Select *Create* at the *Work with Special Handling Format Screen*.

Field	Description
S/H format code (Special handling format code)	A code to identify the special format. Alphanumeric, 2 positions. Create screen: required. Change screen: display-only.
Description	The description of the special format. Alphanumeric, 30 positions; required.
Status	This code indicates if the special format is active. Valid values: • *Active* • *Inactive* The system issues a message in Order Entry when you enter an item that uses an inactive special handling format and it will not accept the item on the order. Required.
S/H extract	This flag controls whether the system will include items to receive this type of special handling in extract files. If an outside service performs special handling for you, you might want to use these tables to transmit information to them. The system generates these tables when you generate pick slips. In order to generate the tables for custom special handling items, both this field and the *Generate Custom Special Handling File (D66)* system control value must be *selected*. • *Selected* = Include items to receive this type of special handling in the custom special handling extract. • *Unselected* = Do not include items to receive this type of special handling in the custom special handling extract.
S/H hold	Indicates whether to automatically put an order line on hold when it uses this special handling format. *Selected* = When you create an order line using this format, or apply this format to an existing order line, the system puts the order line on hold. *Unselected* = The system does not automatically put an order line on hold when it uses this special handling format. See *Putting a Line on Hold through a Special Handling Format*.

Work with Special Handling Format Detail Screen

Purpose: Use this screen to create, change, display, or delete the actual format of a custom special handling screen or to define appropriate responses for fields on the screen.

How to display this screen: Select *Work with details* for a special handling format at the *Work with Special Handling Format Screen*.

Field	Description
Special format code	A code used to identify the special format, carried over from the *Work with Special Handling Format Detail Screen*. You enter this code in the S/H format field in the Additional Charge Code table to link a custom special handling format screen to a type of special handling. The description associated with the special handling format appears to the right of the code. Alphanumeric, 2 positions; display-only.
Field label	The name of the input field as it appears on the *Work with Custom Special Handling Screen* in Order Entry. Alphanumeric, 15 positions; display-only.
Valid responses	The valid values you have defined for the input field. If the field will accept any response in Order Entry without validation, this field will be blank on the *Work with Special Handling Format Screen*. Responses appear on this screen separated by commas. The Work with Special Handling Format screen may not display all responses if there is not sufficient room. Alphanumeric, 45 positions; display-only.
Default response	The value to appear automatically in the input field on the special handling screen in Order Entry. Enter the same response in the Valid responses field, above. You can override the default value in order entry. Alphanumeric, 25 positions; display-only.
F/O (Feature option)	Indicates whether the input field is a feature option. A feature option is an extra feature that can be added to the item, possibly for an additional charge. Define the price and cost for the custom special handling in a required feature option field to add the base price of the special handling to the order and the base cost to the drop ship purchase order. You can also define additional feature options, with or without additional costs; the price and/or cost will be added to the order as long as you enter a valid value in the input field in order entry. • *Y* = Feature option • *N* = Not a feature option Display-only.
Req (Required)	Indicates whether entry in the input field is required in Order Entry. • *Y* = Required • *N* = Not required. Display-only.

Field	Description
Default text	This code allows you to select text from the Customer Sold-to table to default onto a Custom Special Handling Detail Line in Order Entry/Order Maintenance. Each code is associated with specific text. For example, selecting code 4 will default the first name, middle initial and last name of the sold-to customer onto a special handling detail line. The first 14 characters of the description appear to the right of the default text code. Any default text overrides valid responses. You cannot use default responses. Valid values are: • First Name: 15 positions • Middle Initial: 1 position • Last Name: 25 positions • First Name, Middle Initial, Last Name: 41 positions • Company Name: 30 positions • Street Address: 32 positions • Apartment Number: 10 positions • Address Line 2: 32 positions • Address Line 3: 32 positions • Address Line 4: 32 positions • City: 25 positions • State Code: 2 positions • Zip Code: 10 positions • City, State, Zip Code: 37 positions • Country Code: 3 positions • Prefix: 3 positions • Suffix: 3 positions • Daytime Phone Number: 14 positions • Evening Phone Number: 14 positions • Mobile\Fax Phone Number: 14 positions **Note:** The *Third Phone Number Type (L53)* system control value determines whether the third phone number is labeled the Fax or Mobile number on screens and reports. Display-only.

Screen Option	Procedure
Add a field to the custom special handling format screen	Select *Create* to advance to the *Create Special Handling Format Detail Screen*.

Screen Option	Procedure
Change a field on the custom special handling format screen	Select *Change* for a field to advance to the Change Special Handling Format Detail screen. You can change any information on this screen except the format code. See *Create Special Handling Format Detail Screen* for field descriptions.
Delete a field on the custom special handling format screen	Select *Delete* for a field.
Display a field on the custom special handling format screen	Select *Display* for a field to advance to the Display Special Handling Format Detail screen. You cannot change any information on this screen. See *Create Special Handling Format Detail Screen* for field descriptions.
Change, delete, display or create the appropriate responses for a field on the custom special handling screen	Select *Responses* for a field to advance to the *Work with Special Format Response Screen*.
Change, delete, display, or create rules that control the application of special handling details for an item on an order	Select Rules for a field to advance to the Work with Special Format Rules Screen.
Adjust the sequence of the fields on the custom special handling screen	Select *Resequence* to update the structure of the custom special handling screen based on the specified sequence.

Create Special Handling Format Detail Screen

Purpose: At this screen, you can define the characteristics of a field that appears on the custom special handling screen.

How to display this screen: At the *Work with Special Handling Format Detail Screen*, select *Create*.

Field	Description
Special format code	A code used to identify the special format, carried over from the *Work with Special Handling Format Detail Screen*. You enter this code in the S/H format field in the Additional Charge Code table to link a custom special handling format screen to a type of special handling. The description associated with the special handling format appears to the right of the code. Alphanumeric, 2 positions; display-only.
Display sequence	This code controls the order in which the input fields display on the *Work with Custom Special Handling Screen* in order entry. The fields display in ascending numeric sequence. Numeric, 3 positions; required.
Field label	The name of the input field as it appears on the *Work with Custom Special Handling Screen* in order entry. Alphanumeric, 15 positions; required.
Required field	This flag indicates whether entry in the input field is required in order entry. • *Selected* = Required • *Unselected* = Not required

Field	Description
Feature option	This flag indicates whether the input field is a feature option. A feature option is an extra feature that can be added to the item, possibly for an additional charge. Define the price and cost for the custom special handling in a required feature option field to add the base price of the special handling to the order and the base cost to the drop ship purchase order. You can also define additional feature options, with or without additional costs; the price and/or cost will be added to the order as long as you enter a valid value in the input field in order entry. • *Selected* = Feature option • *Unselected* = Not a feature option
Default price	Use this field to define the unit price to charge the customer for the feature option. This amount defaults to the *Work with Custom Special Handling Screen* in order entry if the Feature option flag is *selected*. Except in the case of an override as listed below, the system adds this price to the total handling charge on the order if the customer purchases the feature option. You can override the default price: • in the S/H price field for the item offer or SKU offer: see Performing Initial Item Entry (MITM) for information on creating item offers and SKU offers • in order entry if you have authority to do so, based on the Enter or Override Personalization Charge (A40) secured feature. **Note:** The *Evaluate Special Handling Charges by Order Line (D67)* system control value controls whether the handling charge added to the order is based on the number of order lines with special handling or on the total unit quantity. You can enter a price only if the Feature option flag is *selected* and the Default price % field is blank. This is not a required field, even for feature options. Numeric, 13 positions with a 2-place decimal; optional.

Field	Description
Default price %	Use this field to define the percentage used to calculate the price of the feature option. Except in the case of an override as listed below, the system adds this price to the total handling charge on the order if the customer purchases the feature option. The percentage is calculated based on the selling price of the item. You can override the default price: • in the S/H price field for the item offer or SKU offer: see *Performing Initial Item Entry (MITM)* for information on creating item offers and SKU offers • in order entry if you have authority to do so, based on the *Enter or Override Personalization Charge (A40)* secured feature. **Note:** The *Evaluate Special Handling Charges by Order Line (D67)* system control value controls whether the handling charge added to the order is based on the number of order lines with special handling or on the total unit quantity. You can enter a price percentage only if the *Feature option* flag is *selected* and the *Default price* field is blank. Numeric, 13 positions with a 2-place decimal; optional.
Default cost	The unit cost of the feature option for drop ship purchase orders. This cost does not display in order entry or on pick slips; it is the amount that you pay the vendor for the special handling. **Note:** When a special handling format is set to suppress display in order entry, the system creates a purchase order detail line for the special handling only if there is a default response specified for the special handling detail line. You can complete this field only if the *Feature option* flag is *selected* and the *Default cost %* field is blank. Numeric, 13 positions with a 4-place decimal; optional.

Field	Description
Default cost %	A percentage used to compute the cost of the item for drop ship purchase orders, determined as follows: `Cost percentage * Item cost = Unit cost` This cost does not display in order entry or on pick slips; it is the amount that you pay the vendor for the special handling. **Note:** When a special handling format is set to suppress display in order entry, the system creates a purchase order detail line for the special handling only if there is a default response specified for the special handling detail line. You can complete this field only if the *Feature option* flag is *selected* and the *Default cost* field is blank. Numeric, 5 positions with a 2-place decimal; optional.
Default text	Allows you to select text from the customer record to default onto a custom special handling detail line in order entry. Each code is associated with specific text. For a list of the codes and the default text associated with each code, see *Work with Special Handling Format Detail Screen*. Optional.
Max # characters	Indicates the maximum number of characters allowed for this special handling detail line. You can define any number from 0 to 45. If you define 0 as the maximum number, it is treated as a blank field and allows the maximum 45 characters to be used. The value you select will display to the right of this field. Text cannot exceed the maximum number of characters allowed in the special format detail table. A message similar to the following displays if your entry exceeds the maximum number of characters allowed in the special format detail table: `Exceeds Maximum Characters Allowed` If the *Include Spaces in Special Handling Edit for Maximum Characters (F80)* system control value is *selected*, the system includes spaces in the edit to determine the maximum number of characters allowed for a custom special handling input field. *Example:* When this system control value is *selected*, the Exceeds Maximum Characters Allowed error message indicates if a user enters Paws and Claws Limited Supplies in an input field that is set up with a maximum character length of 30 positions. If this system control value is *unselected*, the system would not display the error message since the number of characters not including spaces is 27. Numeric, 2 positions; optional.

Field	Description
Cross reference	A code used to cross reference between the special handling format detail in Order Administration and the element's code on the manufacturing system. The manufacturing system records this cross reference code in the Order Special Format table when a special format defined with this code is used in order entry. Alphanumeric, 3 positions; optional.

Work with Special Format Response Screen

Purpose: Use this screen to create, change or delete valid responses of fields that appear on the custom special handling screen.

You need to enter responses only if you want the system to validate responses for this field in order entry. Any default text used overrides valid responses in Order Entry/ Order Maintenance. Otherwise, this screen displays only free-form entry fields for valid responses. Enter one response per line.

How to display this screen: This screen appears automatically after you create a Special Handling Format Detail record. You can also display this screen by selecting *Responses* for an existing Detail record at the *Work with Special Handling Format Detail Screen*.

Defining responses: To create valid responses for a field on the custom special handling screen, enter one desired response(s) per line. A second line, labeled desc, is available under the first line for entry of the description of the valid response. This description is displayed in order entry if the *Display Special Format Response Descriptions in Order Entry (E90)* system control value is *selected*.

Entering response descriptions is helpful if you use codes to represent valid responses. For example, if you identify the color black with the code 8859, order entry operators can identify code 8859 as black by referring to the valid response description field.

> **Note:**
>
> If the *Enter Custom Special Handling in Upper and Lower Case (D65)* system control value is *selected*, you can enter case-sensitive responses in this field in Order Entry.

You can define an unlimited number of responses for a field by selecting *Next* to display additional input fields on the Work with Special Format Response screen (not all responses may appear, however, on the Work with Special Format Detail screen).

If you enter any valid responses on this screen, the system validates responses in Order Entry against your entries here.

Responses for feature options: When defining responses for a feature option, remember that the system adds the price defined for the feature option to the order if you enter any valid response in Order Entry.

You can use a required feature option to add the price of the basic special handling to the order. You can then add additional feature options if desired, with or without associated prices.

Identifying a default response: You can define a default response for the field by selecting *Change* for the detail record. Enter the desired default in the *Default response* field on the Change Special Format screen. The system validates your entry against the responses you have previously defined for the field.

Displaying responses: Select *Responses* for a Detail record at the *Work with Special Handling Format Detail Screen* to review the valid responses for a field on the custom special handling screen.

Changing or deleting: Select *Resequence* at the *Work with Special Format Response Screen* to update or delete a response.

Type over the existing value to update the response or *Tab* through the response to delete it.

Work with Special Format Rules Screen

Purpose: Use this screen to work with rules to validate the custom special handling instructions for order lines that use a particular custom special handling format.

Why set up rules? Setting up rules for a complex special handling format helps you prevent the customer or CSR from entering special handling instructions that are inconsistent, impractical, or otherwise invalid. For example, for if monogramming is optional, but there are additional requirements when monogramming is selected, setting up rules can help prevent problems in creating the special handling instructions.

What do rules consist of? Each rule includes:

- *an IF statement* that identifies whether the rule applies, for example: If the pocket style for a shirt is equal to “no pocket”
- *a THEN statement* that specifies the rule to apply, for example: then the monogram location cannot be “pocket”

More rule examples:

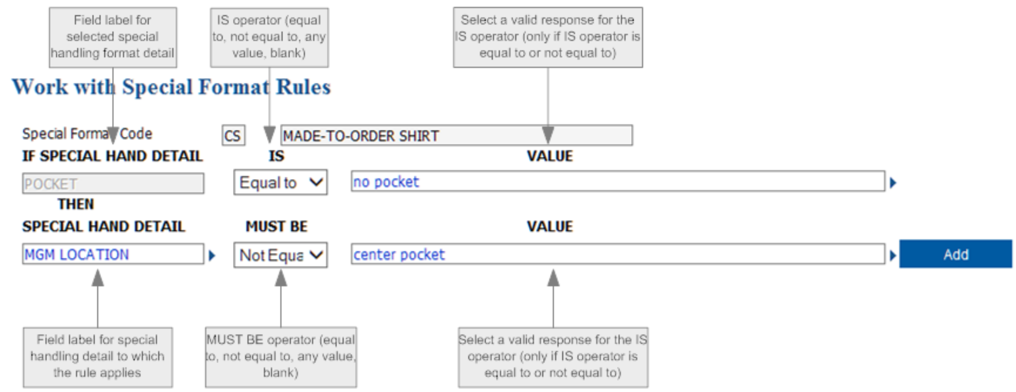
- If the cuff type for a shirt is any value (not blank), then the sleeve length must not be 0 (short sleeve)
- If the cuff type for a shirt is blank (no cuff style specified), then the sleeve length must be 0 (short sleeve)
- If the monogram for a shirt is any value (not blank), then the monogram style must also be any value (not blank)

What if the special handling format violates a rule?

- *Order entry:* When you select *Accept* at the *Work with Custom Special Handling Screen*, the screen displays an error message such as `MGM LOCATION - center pocket response is not valid for POCKET - no pocket`. You need to fix the error before accepting the special handling for the item. If there are multiple errors, the screen displays each error individually, and you need to fix each error before accepting.
- *Order API:* If the special handling instructions do not conform to a rule, the order line is put in error status with an error code of `GA: SH Resp fail defined rule`.

> **Note:**
>
> All existing validation, such as maximum number of characters, still occurs when you use special handling format rules.

Setting up rules is optional.



Field	Description
Special format code	The code and description of the special handling format that you selected from the *Work with Special Handling Format Screen*. Code: alphanumeric, 2 positions; display-only. Description: alphanumeric, 30 positions; display-only.
IF statement	The *IF* statement determines whether to apply the rule.
If special handling detail	The Field label for the special handling detail you selected at the *Work with Special Handling Format Detail Screen*. The *IF* statement must be based on the selected detail. Alphanumeric, 15 positions; display-only.
IS	The test you are using to evaluate whether the special handling rule applies. Possible tests are: *Any Value* = Apply the rule if the entry for the special handling detail for the order line is not blank *Blank* = Apply the rule if there is no entry for the special handling detail on the order line *Not Equal To* = Apply the rule unless the entry for the order line matches the value for the IS statement *Equal To* = Apply the rule if the entry for the order line matches the value for the IS statement

Field	Description
Value	The response you are using to qualify the special handling rule based on whether the special handling entry matches or does not match a particular value. You can specify a response value only if the *IS* operator is set to *Not Equal To* or *Equal To*. Typically, you use this field to select one of the responses you set up at the *Work with Special Format Response Screen*. *Example:* Apply the rule if the pocket style is equal to "no pocket," where: • *pocket style* is the Field label for the special handling detail you selected at the *Work with Special Handling Format Detail Screen* • *Equal To* is the operator you selected at the *IS* field • *no pocket* is a valid response for the special handling detail You cannot enter a value here if the *IS* operator is set to *Any Value* or *Blank*. • Determining whether a response is a match occurs regardless of case; a value of `BLACK` is the same as a value of `black`. • You can enter a value, rather than selecting it from the valid responses, only if you have not set up any responses with the *Work with Special Format Response Screen*.
THEN statement	The *THEN* statement defines the rule to apply.
Then special handling detail	Select the Field label for the special handling detail that is affected by the rule. *Example:* If the font is blank, then the monogram must be blank, where: • *font* is the special handling detail from the IF statement (the IF special handling detail) • *BLANK* is the operator for the IF statement • *monogram* is the Field label for the special handling detail selected here • *Blank* is the operator selected at the MUST BE field, below. You can select the Field label for any of the special handling details set up for the custom special handling format you are working with except for the IF special handling detail.
MUST BE	The operator that applies to the entry for the Then special handling detail. Possible operators are: *Any Value* = The entry for the Then special handling detail cannot blank *Blank* = The entry for the Then special handling detail must be blank *Not Equal To* = The entry for the Then special handling detail must not match the value for the THEN statement *Equal To* = The entry for the Then special handling detail must match the value for the THEN statement

Field	Description
Value	The response that either must match (*Equal To*) or cannot match (*Not Equal To*) the response on the order. If the *MUST BE* operator is set to *Not Equal To* or *Equal To*, use this field to select one of the responses you set up at the *Work with Special Format Response Screen*. *Example:* The cuff style must be equal to "no cuff" where: • *cuff style* is the Field label for the special handling detail you selected at the *Work with Special Handling Format Detail Screen* • *Equal To* is the operator you selected at the *MUST BE* field • *no cuff* is a valid response for the special handling detail You cannot select a value here if the *IS* operator is set to *Any Value* or *Blank*. • Determining whether a response is a match occurs regardless of case; a value of `BLACK` is the same as a value of `black`. • You can enter a value, rather than selecting it from the valid responses, only if you have not set up any responses with the *Work with Special Format Response Screen*.

Establishing Add Reason Codes (WADR)

Overview: Use the Add Reason Code table to establish codes for tracking the reasons you add items to orders in Order Entry or Order Maintenance. Examples of reasons for adding items to an order include:

- mis-shipments
- exchanges
- allowing the customer to select a different item or SKU for a backordered item
- the item is a warranty part

You might want to track this information to identify problem areas, and focus your training or quality control efforts.

Required when? The system requires an add reason code if the:

- Require Reason for Lines Added in Order Maintenance (D75) system control value is *selected*, or
- *Required reason code* flag for the item offer or SKU offer is *selected*.

Pop-up window: When an operator adds an item by selecting *Create*, entering an exchange, or adding a mis-ship to an order in order maintenance, the *Enter Add Reason Window* pop-up window opens.

> **Note:**
>
> When the item is added automatically to an order through the order API, the add reason code is not required. For example, an item might be added to an order automatically if it is set up as a free gift by source code.

Report: You can review add reason codes assigned to new order lines with the *Order Addition Audit Report*.

In this topic:

- *Work with Add Reason Screen*
- *Create Add Reason Screen*

For more information:

- reviewing the add reason code for an order line: *Display Order Line History Screen*
- adding an item to an order: *Adding an Item in Order Maintenance*

Work with Add Reason Screen

How to display this screen: Enter *WADR* in the Fast path field at the top of any menu or select Work with Add Reason Codes from a menu.

Field	Description
Reason	This code represents the reason for adding an item to an order in order entry or order maintenance. Alphanumeric, 5 positions; optional.
Description	The description of the add reason. Alphanumeric, 30 positions; optional.

Screen Option	Procedure
Create an add reason code	Select *Create* to advance to the *Create Add Reason Screen*.
Change an add reason code	Select *Change* for an add reason code to advance to the Change Add Reason screen. You can change only the reason description. See *Create Add Reason Screen* for field descriptions.
Delete an add reason code	Select *Delete* for an add reason code.
Display an add reason code	Select *Display* for an add reason code to advance to the Display Add Reason screen. You cannot change any information on this screen. See *Create Add Reason Screen* for field descriptions.

Create Add Reason Screen

Purpose: Use this screen to create an add reason code.

How to display this screen: Select *Create* at the *Work with Add Reason Screen*.

Field	Description
Order addition reason code	A code to identify the reason for adding an item reason code to an order in order entry or order maintenance, such as a mis-ship or exchange. Alphanumeric, 5 positions. Create screen: required. Change screen: display-only.

Field	Description
Description	The description of the add reason. Alphanumeric, 30 positions; required.

Working with Order Inquiry Reason Codes (WORC)

Purpose: Order inquiry reason codes allow you to define the reason why a CTI operator advanced to standard order inquiry or order maintenance from the *Customer Selection Screen*.

You can use order inquiry reason codes to determine why customers are inquiring about their orders or requesting maintenance on their orders. For example, if customers are inquiring about when they can expect to receive the merchandise on their orders, you can train your order entry operators to inform the customers of the expected delivery date.

> **Note:**
>
> You can enter an order inquiry reason code only if you advance to standard (not streamlined) order inquiry or order maintenance from the *Customer Selection Screen*, and system control value *Require Reason in CTI (G98)* is *selected.* In this case a window displays requiring an order inquiry reason code when you return to the CTI Customer Selection screen after using order inquiry or order maintenance. If you advance to order inquiry from the *Order Inquiry Scan Screen* or you advance to order maintenance from the *Select Customer Sold To For Order Screen*, the system will not allow you to enter an order inquiry reason code.

You must set up Order Inquiry Reason codes before advancing to the Order Inquiry Reason code window. If you advance to this window and have no valid Order Inquiry Reason codes to enter, you will not be able to exit the window.

About CTI Customer Selection screen: This screen allows you to review a customer’s address information and order history before entering, maintaining, or reviewing an order. In order to advance to this screen:

- the *Use Computer Telephony Integration (F26)* system control value must be *selected*
- the CTI user flag in *Working with User Records (WUSR)* is *selected*
- the CTI default screen field in Work with User Records (WUSR) is set to *Always display CTI screen* or *Display CTI scrn w/call*.

How do order inquiry reasons relate to the order? When you define an order inquiry reason code after maintaining or reviewing an order, the system does not assign the order inquiry reason code to the order. Instead, the system tracks the number of times a specific user maintained or reviewed an order or orders associated with a specific line of business for a specific date and a specific order inquiry reason. You can review order inquiry reason history at the *Order Inquiry Reason History Screen*.

In this topic:

- *Order Inquiry Reason Codes Window*
- *Work with Order Inquiry Reason Screen*
- *Create Order Inquiry Reason Screen*
- *Order Inquiry Reason History Screen*

Order Inquiry Reason Codes Window

Purpose: Use this window to enter the reasons why the order was maintained or reviewed. You can enter up to five order inquiry reason codes.

How to display this window: If the *Require Reason in CTI (G98)* system control value is *selected* and you do not have authority to the *Bypass CTI Reason Code (B24)* secured feature, the system displays the Order Inquiry Reason Codes window when you return to the *Customer Selection Screen* from order inquiry or order maintenance.

> **Note:**
>
> You can prompt on a reason code field by clicking the Prompt arrow to display valid reason codes, but you cannot create a reason code at the selection screen. To create reason codes, you must use the *Create Order Inquiry Reason Screen*.

Field	Description
Order inquiry reason codes	A code to define the reason why a CTI operator advanced to order inquiry or order maintenance from the CTI Customer Selection screen. A message displays if you do not enter at least one order inquiry reason code: `At least one field must be entered to continue.` Order inquiry reason codes are defined in and validated against the Order Inquiry Reason Code table. Alphanumeric, five 3-position fields; required.

Work with Order Inquiry Reason Screen

Purpose: Use this screen to work with order inquiry reason codes.

How to display this screen: Enter *WORC* in the Fast path field at the top of a menu or select Work with Order Inquiry Reason from a menu.

Field	Description
Reason code	A code to define the reason why a CTI operator advanced to order inquiry or order maintenance from the CTI Customer Selection screen. Order inquiry reason codes are defined in and validated against the Order Inquiry Reason Code table. Alphanumeric, 3 positions; optional.
Description	A description of the order inquiry reason. Alphanumeric, 30 positions; optional.

Field	Description
Cost	The cost to your company for the CTI operator to review or maintain the order. This field is informational only. Numeric, 13 positions with a 4-place decimal; display-only.

Screen Option	Procedure
Change an order inquiry reason code	Select *Change* for a code to advance to the Change Order Inquiry Reason screen. At this screen, you can change every field except the Order inquiry reason code field. See *Create Order Inquiry Reason Screen* for field descriptions.
Delete an order inquiry reason code	Select *Delete* for a code to delete it. **Note:** The system allows you to delete an order inquiry reason code even if order inquiry reason history exists. If you delete the code, you will lose the history related to this order inquiry reason.
Display an order inquiry reason code	Select *Display* for a code to advance to the Display Order Inquiry Reason screen. You cannot change any fields on this screen. See *Create Order Inquiry Reason Screen* for field descriptions.
Review order inquiry reason history	Select *History* for a code to advance to the *Order Inquiry Reason History Screen*.
Create an order inquiry reason code	Select *Create* to advance to the *Create Order Inquiry Reason Screen*.

Create Order Inquiry Reason Screen

Purpose: Use this screen to create an order inquiry reason code.

How to display this screen: Select *Create* at the *Work with Order Inquiry Reason Screen*.

Field	Description
Order inquiry reason code	A code to define the reason why a CTI operator advanced to order inquiry or order maintenance from the CTI Customer Selection screen. Order inquiry reason codes are defined in and validated against the Order Inquiry Reason Code table. Alphanumeric, 3 positions. Create screen: required. Change screen: display-only.
Description	A description of the order inquiry reason. Alphanumeric, 30 positions; required.
Cost	The cost to your company for the CTI operator to review or maintain the order. This field is informational only. Numeric, 13 positions with a 4-place decimal; display-only.
User field	An informational field where you can enter additional order inquiry reason information. Alphanumeric, 3 positions; optional.

Order Inquiry Reason History Screen

Purpose: Use this screen to review history for a specific order inquiry reason code.

You can review:

- each day this reason code was used for an order or orders
- the CTI operator who entered the reason
- the number of times this operator reviewed or maintained an order or orders for a specific date and line of business
- the line of business associated with the order or orders for a specific date and CTI operator

How to display this screen: Select *History* for an order inquiry reason code at the *Work with Order Inquiry Reason Screen*.

Field	Description
Order inquiry reason code	The code and description for the reason why a CTI operator advanced to order inquiry or order maintenance from the CTI Customer Selection screen. Order inquiry reason codes are defined in and validated against the Order Inquiry Reason Code table. Code: Alphanumeric, 3 positions; display-only. Description: Alphanumeric, 30 positions; display-only.
Date	The date when this code was used as the reason for maintaining or reviewing an order(s). Numeric, 6 positions (in user date format); optional.
User	The user ID of the person who maintained or reviewed the order(s) and used this order inquiry reason code. Alphanumeric, 10 positions; display-only.

Field	Description
Number	The number of times an order(s) was maintained or reviewed on a specific date by a specific user for this order inquiry reason code. Numeric, 5 positions; display-only.
LOB (line of business code)	The line of business code associated with the order(s) maintained or reviewed on a specific date by a specific user for this order inquiry reason code. A line of business represents a client or business unit in Order Administration. These codes contain assignments that represent a specific entity, division, or offer, or a combination of these values. Each order is assigned a specific line of business, based on the entity, division, and offer associated with the order. See *Working with Lines of Business (WLOB)*. Alphanumeric, 3 positions; optional.

Working with Order/Call Disposition Reject Reason Codes (WWRR)

Purpose: Order/call disposition reject reason codes allow you to define the reason why an order entry operator rejected an order an ended a call received from an external order call center before an order was placed.

You can use the order/call disposition reject reason codes to determine why the order or call was rejected.

To assign an order/call disposition reject reason code to an order or call: The setting of the *Capture Order/Call Disposition (K03)* system control value controls when the system requires an order/call disposition reject reason code.

- If set to *ORDER*, the system requires you to enter an order/call disposition reject reason code at the *Confirm Order/Call Disposition Window* when you reject from an order in interactive Order Entry. **Note:** Interactive order entry in this situation does not include batch order entry, web orders, or membership orders.
- If set to *ALL*, the system requires you to enter an order/call disposition reject reason code at the *Confirm Order/Call Disposition Window* when you:
- reject from an order in interactive Order Entry.
- end a call received from an external order call center or select *Exit* at the *Select Customer Sold To For Order Screen* if a Universal call ID has been captured for the call in the Order Disposition table.
- If set to *NONE* or blank, you cannot assign an order/call disposition reject reason code to an order.

To view the reject reason assigned to an order or call: When you assign an order/call disposition reject reason code to an order or call, the system creates a record in the Order Disposition table. **Note:** You cannot view the information in the Order Disposition table from any Order Administration screen; see *Order Disposition Table* for a description of the fields in this table.

Work with Reject Reason Screen

Use this screen to work with order/call disposition reject reason codes.

How to display this screen: Enter *WWRR* in the Fast path field at the top of a menu or select Work with Reject Reasons from a menu.

Field	Description
Reason	A code to define the reason why an order entry operator rejected an order an ended a call from an external order call center before an order was placed. Order/call disposition reject reason codes are defined in and validated against the Reject Reason table. Enter a reason code and select *OK* to display reason codes in alphanumeric sequence, beginning with your entry. Alphanumeric, 2 positions; optional.
Description	A description of the order/call disposition reject reason. Enter a full or partial description and select *OK* to display reject reasons that contain your entry. Alphanumeric, 30 positions; optional.

Screen Option	Procedure
Create an order/call disposition reject reason	Select *Create* to advance to the *Create Reject Reason Screen*.
Change an order/call disposition reject reason	Select *Change* for an order/call disposition reject reason to advance to the Change Reject Reason screen. At this screen, you can change the Description. See *Create Reject Reason Screen* for field descriptions.
Display an order/call disposition reject reason	Select *Display* for an order/call disposition reject reason to advance to the Display Reject Reason screen. You cannot change any fields on this screen. See *Create Reject Reason Screen* for field descriptions.
Delete an order/call disposition reject reason	Select *Delete* for an order/call disposition reject reason to delete it. The system allows you to delete an order/call disposition reject reason even if it has been assigned to an order or call.

Create Reject Reason Screen

Purpose: Use this screen to create an order/call disposition reject reason code.

How to display this screen: Select *Create* at the *Work with Reject Reason Screen*.

Field	Description
Order reject reason code	A code to define the reason why an order entry operator rejected an order an ended a call from an external order call center before an order was placed. Order/call disposition reject reason codes are defined in and validated against the Reject Reason table. Alphanumeric, 2 positions. Create screen: required. Change screen: display-only.

Field	Description
Description	A description of the order/call disposition reject reason. Alphanumeric, 30 positions; required.

Working with Default Messages (WMSG)

Default messages are standard order or gift messages that you enter on orders on a regular basis. Instead of requiring users to retype a standard message on each eligible order, you can have the user select the message from a list of standard messages to default to the order, allowing you to avoid typographical errors that can occur when the message is manually added to the order. You can create default messages for order level messages and line level messages. When a user selects a default message to add to an order, the message text defined for the default message defaults to the Message field and the print code defined for the default message defaults to the Print field; however, the user can still override the default message text and the print code or add to the default message text. For example, if a user selects to default `Happy Birthday`, the user may wish to modify the message line to read .

Default message examples: An example of the type of messages you may wish to default are listed below.

- Happy Birthday
- Happy Anniversary
- Congratulations
- Merry Christmas
- Happy Holidays
- Season’s Greetings
- Best Wishes
- Thinking of You,
- With Deepest Sympathy,
- Use discount code PR5 to receive 5% off your next order.

Selecting Default Messages in Contact Center

The Print Code setting for default messages controls whether they are available for selection in Contact Center:

- *Order Messages:* Default order messages are available for selection in Contact Center based on the Print Code setting:
- *Nowhere*: Can apply to an order message in Contact Center. Only these default messages are available for selection as message templates in Contact Center order entry.
- *Picks*: Can apply to a pick message (under Customer Messages) in Contact Center, including Contact Center order entry.
- *Gift*: Can apply to a gift message (under Customer Messages) in Contact Center, including Contact Center order entry.

- *Quote*: Can apply to a quote message (under Customer Messages) in Contact Center.
- *Ref Chk Cust*: Can apply to a refund check message (under Customer Messages) in Contact Center.
- *Order Line Messages:* Default order line messages are available for selection in Contact Center, including Contact Center order entry, regardless of the Print Code setting.

Order and order line default messages with any other print code settings are not available in Contact Center.

In this topic:

- *Work with Default Messages Screen*
- *Create Default Message Screen*
- *Change Default Message Screen*
- *Select Default Message Screen*

For more information:

- *Adding Order Messages*
- *Work with Order Line Messages Screen* (in Order Entry/Maintenance)
- *Item Availability Screen* (in Order Inquiry)

Work with Default Messages Screen

Use the Work with Default Messages screen to review default messages. From this screen, you can also create, change, or delete a default message.

Default messages display on this screen in message type, message code sequence.

How to display this screen: Enter *WMSG* in the Fast path field at the top of a menu or select Work with Default Messages from a menu.

Column sort: You can sort on any column on this screen by clicking on the column name. An arrow pointing up displays next to the field to indicate the values for the field display in ascending sequence; an arrow pointing down displays next to the field to indicate the values for the field display in descending sequence.

Default messages initially display on this screen alphanumerically by message type, message code sequence.

Field	Description
Message Type	A code that indicates whether the default message text is used for order level messages or order line level messages. Valid values: • *Order Message* = The default message text is used for order messages. • *Order Line Message* = The default message text is used for order line messages. *Search:* Select a message type to display default messages that match your entry. Alphanumeric; Optional.

Field	Description
Message Code	A unique code used to identify the default message. **Note:** The message code must be unique within the message type; however, you can use the same message code for an *Order Message* and an *Order Line Message* message type. For example, you may wish to define a default message of `Happy Birthday` at the order message level and at the order line message level. *Search:* Select a *Message Type* and enter a full or partial message code to display default messages in alphanumeric sequence within message type, starting with your entry. Alphanumeric, 2 positions; Optional.
Default Message	The text you wish to automatically default to the message line when a user selects this default message. The system defaults the message text to the message line; however, the user can override the default message text or add to the default message text. For example, if a user selects to default `Happy Birthday`, the user may wish to modify the message line to read `Happy Birthday, Mom!` *Search:* Enter text in this field to display default messages that contain the text you entered. Alphanumeric, 60 positions; Optional.

Field	Description
Print Code	A code that indicates where, if at all, the message displays. The print code you define defaults to the Print field on the Work with Order Messages Screen or Work with Order Line Messages Screen. Valid values for *Order Message*: • *Both* = Print on both the pick slip and invoice. • *Ref Chk Cust* = Print on refund check only. • *Gift Message* = Gift message on pick slip. • *Invoices* = Print on invoice only. • *Nowhere* = Do not print. • *Picks* = Print on pick slip only. • *Quotes* = Print on the Quote Form. • *Ref Chk Int* = Print in detachable area of refund check not visible to the customer. • *User Defined* = Print on a document defined by the user, such as a custom pick slip. Valid values for *Order Line Message*: • *Nowhere* = Do not print. • *Both* = Print on both the pick slip and invoice. • *Invoices* = Print on invoice only. • *Picks* = Print on pick slip only. *Search:* Select a Message Type and enter a valid print code to display default messages that match your entry. **Contact Center:** See Selecting Default Messages in Contact Center for information on default messages available for selection in Contact Center, based on Print Code setting. Alphanumeric; Optional.

Screen Option	Procedure
Create a default message.	Select *Create* to advance to the Create Default Message Screen.
Change a default message.	In the Action field, select *Change* for a default message to advance to the Change Default Message Screen.
Delete a default message.	In the Action field, select *Delete* for a default message to advance to the Confirm Delete window. Select *Yes* to confirm the delete or select *No* to cancel the delete.

Create Default Message Screen

Purpose: Use this screen to create a new default message record.

How to display this screen: Select *Create* at the Work with Default Messages Screen.

Field	Description
Message Type	A code that indicates whether the default message text is used for order level messages or order line level messages. Valid values: • *Order Message* = The default message text is used for order messages. • *Order Line Message* = The default message text is used for order line messages. Alphanumeric; Required.
Message Code	A unique code used to identify the default message. **Note:** The message code must be unique within the message type; however, you can use the same message code for an *Order Message* and an *Order Line Message* message type. For example, you may wish to define a default message of `Happy Birthday` at the order message level and at the order line message level. Alphanumeric, 2 positions; Required.
Default Message	The text you wish to automatically default to the message line when a user selects this default message. The system defaults the message text to the message line; however, the user can override the default message text or add to the default message text. For example, if a user selects to default `Happy Birthday`, the user may wish to modify the message line to read `Happy Birthday, Mom!` Alphanumeric, 60 positions; Required.

Field	Description
Print Code	A code that indicates where, if at all, the message displays. The print code you define defaults to the Print field on the *Work with Order Messages Screen* or *Work with Order Line Messages Screen*. Valid values for *Order Message*: • *Both* = Print on both the pick slip and invoice. • *Ref Chk Cust* = Print on refund check only. • *Gift Message* = Gift message on pick slip. • *Invoices* = Print on invoice only. • *Nowhere* = Do not print. • *Picks* = Print on pick slip only. • *Quotes* = Print on the *Quote Form*. • *Ref Chk Int* = Print in detachable area of refund check not visible to the customer. • *User Defined* = Print on a document defined by the user, such as a custom pick slip. Valid values for *Order Line Message*: • *Nowhere* = Do not print. • *Both* = Print on both the pick slip and invoice. • *Invoices* = Print on invoice only. • *Picks* = Print on pick slip only. **Contact Center:** See *Selecting Default Messages in Contact Center* for information on default messages available for selection in Contact Center, based on Print Code setting. Alphanumeric; Required.

Change Default Message Screen

Purpose: Use this screen to change a default message record.

How to display this screen: Select *Change* for a default message at the *Work with Default Messages Screen*.

Field	Description
Message Type	A code that indicates whether the default message text is used for order level messages or order line level messages. Alphanumeric; Display-only.
Message Code	A unique code used to identify the default message. Alphanumeric, 2 positions; Display-only.
Default Message	The text you wish to automatically default to the message line when a user selects this default message. The system defaults the message text to the message line; however, the user can override the default message text or add to the default message text. For example, if a user selects to default `Happy Birthday`, the user may wish to modify the message line to read `Happy Birthday, Mom!` Alphanumeric, 60 positions; Required.

Field	Description
Print Code	A code that indicates where, if at all, the message displays. Valid values for *Order Message*: • *Both* = Print on both the pick slip and invoice. • *Ref Chk Cust* = Print on refund check only. • *Gift Message* = Gift message on pick slip. • *Invoices* = Print on invoice only. • *Nowhere* = Do not print. • *Picks* = Print on pick slip only. • *Quotes* = Print on the *Quote Form*. • *Ref Chk Int* = Print in detachable area of refund check not visible to the customer. • *User Defined* = Print on a document defined by the user, such as a custom pick slip. Valid values for *Order Line Message*: • *Nowhere* = Do not print. • *Both* = Print on both the pick slip and invoice. • *Invoices* = Print on invoice only. • *Picks* = Print on pick slip only. **Contact Center:** See *Selecting Default Messages in Contact Center* for information on default messages available for selection in Contact Center, based on Print Code setting. Alphanumeric, Required.

Select Default Message Screen

Purpose: Use this screen to review and select a standard message that you wish to default to an order. When you select a default message to add to an order, the message text defined for the default message defaults to the Message field and the print code defined for the default message defaults to the Print field; however, you can still override the default message text and the print code or add to the default message text. For example, if a user selects to default `Happy Birthday`, the user may wish to modify the message line to read `Happy Birthday, Mom! Love, Alex and Beth`.

How to display this screen: Select the prompt arrow for the Messages field on one of the following screens:

- *Item Availability Screen* (Order Inquiry) *Note:* Only default messages identified as Message type *Order Line Message* display on this screen.
- *Work with Order Line Messages Screen* (Order Entry/Maintenance) *Note:* Only default messages identified as Message type *Order Line Message* display on this screen.
- *Work with Order Messages Screen* *Note:* Only default messages identified as Message type *Order Message* display on this screen.

Contact Center: Default messages are also available for selection in Contact Center, depending on the Print Code setting. See *Print Code*, above, for background.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Code (Message code)</td><td>A code used to identify a default message.
Default message codes are defined in and validated against the Default Message table.
Enter a full or partial message code to display default messages in alphanumeric sequence, starting with your entry.
Alphanumeric, 2 positions; optional.</td></tr>
<tr><td>Message (Default text)</td><td>The message text to default to the Message field on one of the following screens:
• Item Availability Screen (in Order Inquiry)
• Work with Order Line Messages Screen (in Order Entry/ Maintenance)
• Work with Order Messages Screen
Once you default the message text, you can still modify the message line.
Enter text in this field to display default messages in alphanumeric sequence that contain your entry.
Alphanumeric, 60 positions; optional.</td></tr>
<tr><td>Print Code</td><td>The code that indicates where, if at all, the message displays.
Valid values for Order Message:
• Both = Print on both the pick slip and invoice.
• Check Cust = Print on refund check only.
• Gift Msg = Gift message on pick slip.
• Invoices = Print on invoice only.
• Nowhere = Do not print.
• Picks = Print on pick slip only.
• Quotes = Print on the Quote Form.
• Check Int = Print in detachable area of refund check not visible to the customer.
• User = Print on a document defined by the user, such as a custom pick slip.
Valid values for Order Line Message:
• Nowhere = Do not print.
• Both = Print on both the pick slip and invoice.
• Invoices = Print on invoice only.
• Picks = Print on pick slip only.
Contact Center: See Selecting Default Messages in Contact Center for information on default messages available for selection in Contact Center, based on Print Code setting.
Alphanumeric; display-only.</td></tr>
</table>

<table>
<tr><th>Screen Option</th><th>Procedure</th></tr>
<tr><td>Select a default message</td><td>Select the Code (Message code) field to default the associated Message (Default text) and Print Code to the Messages and Print field on the following screens:
• Work with Order Line Messages Screen
• Work with Order Messages Screen</td></tr>
</table>

Working with Order Line Activity Codes (WOLA)

Order line activity codes define the type of activity, such as a shipment or return, performed against an item on an order line. You can review the activity performed against an item on an order line on the *Display Order Line History Screen*. You can use the Work with Order Line Activity Codes (WOLA) menu option to review system-delivered order line activity codes and to also create user-defined order line activity codes.

In this topic:

- *System Delivered Order Line Activity Codes*
- *Work with Order Line Activity Codes Screen*
- *Create Order Line Activity Code Screen*

System Delivered Order Line Activity Codes

The system automatically creates the system delivered order line activity codes in the Order Line Activity table and displays them on the *Work with Order Line Activity Codes Screen*.

Activity Code	Description
A	Add; the order line is added to the order during order maintenance or exchange, or through a system process, such as Process Item Substitutions (PSUB).
B	Express Bill; the order line is express billed.
C	Cancel; a quantity of the item on the order line is cancelled during order maintenance or through a system process, such as Process Item Substitutions (PSUB). This includes canceling or reducing quantity using a cancel reason code flagged not to reduce demand.
D	Discount; a discount is applied to the order line after shipment.
E	Exchange; the order line is added to the order as an exchange item during return processing.
G	Change; the order line is changed during order maintenance. This includes changes that don’t affect quantity, in addition to canceling or reducing quantity using a cancel reason code flagged to reduce demand.
J	Item Hold; the order line was put on hold.
O	Sold Out; a quantity of the item on the order line has been sold out. • If the item was soldout using the *Sell Out* option in order maintenance, the order line history will be negative and the name of the user who soldout the item displays. • If the order line was sold out automatically in order entry because there was a soldout control code assigned to the item, order line history quantity will be a positive quantity, and the name of the user who entered the order displays. • If the order line was sold out through Process Auto Soldouts, the order line history quantity will be negative and the user ID is the user who processed auto soldouts.
P	Item Partially Shipped; a partial quantity of the item was shipped.
R	Return; a quantity of the item on the order line has been returned.

Activity Code	Description
S	Shipment; a quantity of the order line has been shipped.
X	This code is not currently implemented.
8	Order Line Message Added; an order line message was added.
9	Item Unreserved: the item was unreserved through Work with Void/ Reprint Picks, Interactive Reservation, or the Picking message. This record is not created through the Void Pick Batch option.
#	Item Partially Cancelled; a partial quantity of the order line was canceled through the Cancel option.
+	Item Released from Hold; the line was released from held status.

Work with Order Line Activity Codes Screen

Use this screen to work with system delivered and user defined order line activity codes.

When you first advance to this screen, order line activity codes display on the screen in activity code sequence.

How to display this screen: Enter *WOLA* in the Fast path field at the top of any menu or select Work with Order Line Activity Codes from a menu.

Field	Description
Activity Order line activity code	A code for the type of update against the item on an order line. See *System Delivered Order Line Activity Codes* to review a list of the system delivered order line activity codes and a description of each. *Search:* Enter an activity code to display the order line activity code that matches your entry. *Column sort:* Click the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence. Alphanumeric, 1 position; optional.
System Option	Defines whether the order line activity code is a system delivered code or a user defined code. Valid values: • *Y* = The order line activity code is a system delivered code. You cannot delete a system delivered code. • *N* = The order line activity code is a user defined code. *Search:* Enter a valid system option to display order line activity codes whose System Option setting matches your entry. Alphanumeric, 1 position; optional.
Description	A description of the order line activity. *Search:* Enter a full or partial description to display order line activity codes whose description contains your entry. Alphanumeric, 25 positions; optional.

Screen Option	Procedure
Create a user defined order line activity code	Select *Create* to advance to the *Create Order Line Activity Code Screen*.

Screen Option	Procedure
Delete a user defined order line activity code	In the Action column, select *Delete* for an order line activity code to advance to the Confirm Delete window. Select *Yes* to confirm the delete; otherwise, select *No* to cancel the delete. **Note:** You cannot delete a system delivered order line activity code (the System Option field for the order line activity code is *Y*).

Create Order Line Activity Code Screen

Purpose: Use this screen to create a user defined order line activity code.

How to display this screen: Select Create at the *Work with Order Line Activity Codes Screen*.

Field	Description
Activity Order line activity code	A code for the type of update against the item on an order line. See *System Delivered Order Line Activity Codes* to review a list of the system delivered order line activity codes and a description of each. Alphanumeric, 1 position; required.
Description	A description of the order line activity. Alphanumeric, 25 positions; required.
System Option	*N* defaults, indicating the order line activity code is a user defined code. Alphanumeric, 1 position; display-only.

Setting Up Customer Support Tables

The following topics describe how to create and maintain tables that support Order Entry and Customer Service activities:

- Setting Up the Country Table (WCTY) describes the screens you use to create, change, delete, and display country codes.
- Setting Up the Zip/City/State (Postal Code) Table (WZIP) describes the screens you work with to create tables that support address and tax information associated with postal and zip codes.
- Setting Up Customer Profiles (WPFL) describes the screens you use to define demographics categories and their data options for profiling your customer base.

- Setting Up the Customer Class Table (WCCL) describes the Work with Customer Class screens you use to establish codes to group customers for reporting and other purposes.
- Setting Up Match Codes (MMCH) describes how to view or change the match code structure.
- Setting Up User-Defined Fields (WUDF) describes how you can “design” a screen with user-defined numeric, text or date fields, which you can link to another table (such as the Customer table).
- Working with Postal Code Formats (WPCF) describes how to define the formats of zip and postal codes, so that they will print correctly on pick slips and gift acknowledgments.
- Working with Mail/Call Codes (WMCC) describes how to create codes that define when and under what circumstances you call or send mail to your customers.
- Working with Customer Action Reason Codes (WCAR) describes how to create codes that allow you to define and track the types of issues your customers raise.
- Working with Customer Note Types (WNTY) describes how to create codes that allow you to flag certain types of customer notes to appear automatically in order entry, or define text to default into the note field.
- Working with Language Codes (WLAN) describes the screens you use to create, change and delete language codes.

Setting Up the Country Table (WCTY)

Purpose: Setting up the country table consists of creating identifying codes for each country where your customers or vendors reside. You can also create information related to a country, such as:

- any duty rates that apply to shipments to the country
- the telephone number formats for each country
- valid states for each country, and whether they are subject to VAT
- whether a state or a postal code is required for a customer address
- whether a valid SCF/ship via is required for the ship via and shipping address on an order
- a default VAT or tax rate for the country

Default country: Use the *Default Country for Customer Address (B17)* system control value to specify this default.

In this topic:

– *Create State Screen*

Work with Countries Screen

How to display this screen: Enter *WCTY* in the Fast path field at the top of any menu or select Work with Countries from a menu.

Field	Description
Country	A code representing a country. Alphanumeric, 3 positions; optional.
Description	The name of the country. Alphanumeric, 30 positions; optional.
Require state	Controls whether a state is required in Order Entry, Customer Maintenance, and when setting up item restrictions by country/state. See Entering Additional Item Information, for more information on item country/state restrictions. Valid values are: • *Yes* = A state code is required. • *No* = A state code is not required. Optional.
Country prefix	The country's international telephone prefix. Numeric, 3 positions; optional.
ISO code	A code representing the international standard code used to identify a country. If you use the *Experian Data Quality (EDQ) Address Validate API*, the system sends the ISO country code instead of the country code as part of the address sent to EDQ for standardization. See *Country ISO Codes* for a list of country ISO codes supplied by EDQ. If you are using the ChannelAdvisor integration, you need to specify a 2-position ISO code for each country where you ship orders. See *ChannelAdvisor Integration Overview* and *ChannelAdvisor Setup* for more information. Alphanumeric, 3 positions; optional.

Screen Option	Procedure
Create a country code	Select *Create* to display the *Create Country Screen*.
Change a country code	Select *Change* for a country code to display the Change Country screen. See *Create Country Screen* for field descriptions. You can change any information except the country code.
Delete a country code	Select *Delete* for a country.
Display a country code	Select *Display* for a country code to advance to Display Country screen. You cannot change any information on this screen. See *Create Country Screen* for field descriptions.
Work with duty rates for a country	Select *Duty Rates* for a country code to display the *Work with Duty Rates Screen*.

Screen Option	Procedure
Work with telephone number formats for a country	Select *Phone Format* for a country code to display the *Work with Telephone Number Format Screen*.
Work with state codes for a country	Select *States* for a country code to display the *Work with States Screen*.
Work with user defined fields	Select *User Options* for a country code to advance to the *Work with User Fields Screen*.

Create Country Screen

Purpose: Use this screen to create a country code.

How to display this screen: Select *Create* at the *Work with Countries Screen*.

Field	Description
Country	A code to identify a country. *Invoice currency:* If you want the system to record the currency rate in effect for orders at the time they are billed in the Invoice Currency table, the country code must match a code from the Currency table. You must also have the *Track Invoice Currency (D68)* system control value *selected*. **Note:** This is a separate type of tracking than that related to multi-currency by offer. See *Setting Up Order Entry Values* for more information on defining Order Entry values. Alphanumeric, 3 position. Create screen: required. Change screen: display-only.
Description	A description of the country. This is the description that prints on pick slips, for example. Alphanumeric, 30 positions; required.
Require state?	This flag controls whether a state code is required for customer addresses, or for item country/state restrictions that you set up through the Work with Items menu option. Valid values are: • *Selected* (default) = The state code is required. • *Unselected* = The state code is not required; however, if you do specify a state code for a customer address, it needs to be a valid state for the country as set up through the *Create State Screen*. You can define state codes for a country by selecting *States* for a country at the *Work with Countries Screen*. *Item restrictions:* If a country does not require state codes, you can set up item country/state restrictions for the entire country. Item country restrictions prevent you from entering an order for items which cannot be shipped to this country. See Entering Additional Item Information.

Field	Description
Require postal code?	Indicates whether a postal code is required for customer addresses for the country. Valid values are: • *Selected* (default) = The postal code is required. • *Unselected* = The postal code is optional for customer addresses, and: • You do not need to set up postal code records for the country using the *Setting Up the Zip/City/State (Postal Code) Table (WZIP)* option. • If you enter a postal code for a customer address, the system does not validate it against the Postal Code table or the SCF table. See the Perform ship via edit? flag below for more information. *Brokered backorders:* When the system submits a brokered backorder for fulfillment, Order Orchestration rejects it if the shipping address does not include a postal code. In this situation, the backorder returns to standard backorder processing in the warehouse. See *Brokered Backorders* for more information on brokered backorders.
Perform ship via edit?	Indicates whether to validate the SCF and ship via on an order or order line against the SCF Ship Via table. Valid values are: • *Selected* (default) = The SCF/ship via combination on an order or order line must exist in the SCF Ship Via table. • *Unselected* = The SCF/ship via combination on an order or order line does not need to exist in the SCF Ship Via table. **Note:** The *Require postal code?* flag must be selected for a country if Perform ship via edit? flag is selected. Use *Working with SCF Codes (WSCF)* to create the SCF record of # for the country, and then use *Working with SCF/Ship Via Values (WSHV)* to create the SCF/ship via record for each valid ship via for the country.
Phone country code	A valid international telephone prefix for the country. You can define a telephone number format for a country by selecting *Phone Format* for next to a country at the *Work with Countries Screen*. See *Telephone Number Layout Screen (Create Mode)*. Numeric, 3 positions; optional.

Field	Description
VAT percent (Value added tax percentage)	The default VAT or tax percentage for the country. The system uses this value in two different ways, depending on how the *Tax Included in Price (E70)* system control value is set: *If this system control value is selected* this means that you charge the tax-inclusive price for items you ship to certain states or provinces; instead of including an amount in the Tax bucket on the order, the tax is “hidden” in the item price. To determine the hidden tax amount, the system first checks the SKU record to determine if there is a unique hidden tax amount or percentage defined for the item; if there is no hidden tax information for the item, the system uses the VAT percentage defined for the country where you are shipping the order. If there is no VAT percentage for the customer's country, and if there is no hidden tax information for the SKU, no hidden tax will be charged. Only shipments to states flagged as subject to VAT (the VAT exempt flag is *unselected*) use tax-inclusive pricing and hidden tax. See *Work with States Screen*. The system never checks the VAT percentage for orders subject to regular taxing rather than VAT; instead, the system first checks the customer's postal code record, then the customer's SCF, for the tax rate on the order. *If this system control value is unselected,* this means that any tax on the order is included in the Tax bucket and you never charge a tax-inclusive price or hidden tax. If an item on an order is subject to tax, the system multiplies the item price by the VAT percentage for the customer's country and adds this amount to the Tax bucket on the order. If there is no VAT percentage defined for the customer's country, the system next checks the customer's postal code, then the customer's SCF, to find an applicable tax percentage. See *How Hidden Tax is Calculated by Percentage* for more information. Numeric, 6 positions; optional.
ISO code	A code representing the international standard code used to identify a country. If you use the *Experian Data Quality (EDQ) Address Validate API*, the system sends the ISO country code instead of the country code as part of the address sent to EDQ for standardization. See *Country ISO Codes* for a list of country ISO codes supplied by EDQ. Alphanumeric, 3 positions; optional.

Work with Duty Rates Screen

Purpose: Use this screen to create, change, delete or display duty rates for international orders. The system consults these rates to determine whether to add duty to orders you are shipping to this country.

Overview: Duty is a tax you can add to orders you are shipping to customers in certain countries. The system performs the following checks to determine whether to charge duty for an item in Order Entry:

- *Is the shipper exempt from duty?* If the field for the shipper on the order header is *selected*, the system will not add any duty to the order. This flag must be *unselected* for the system to evaluate the order for duty charges.
- *Does the item's harmonize code match a duty rate defined for the country?* The system compares the harmonize code defined for the item or SKU with the harmonize codes associated with the duty rates. If it finds a match in harmonize code, the system

computes duty for the item and adds this charge to the order. Two blank records are a match; that is, if both the item's and the duty rate's harmonize codes are blank, the system will add the duty to the order. You can define harmonize codes for items through *Performing Initial Item Entry (MITM)* or *Updating Harmonize Codes (UPHC)*.

If you use an external tax system and want to pass the duty information, you must create a product table record for duty.

Reviewing duty charges: Duty appears on the order totals in the Handling bucket, but appears separately on the *Display Order Detail Screen (Reviewing Order Line Detail)* in standard Order Inquiry and the *Work with Order Line Screen (Changing/ Adding an Item)* in Order Entry and Order Maintenance. The system writes an order line message when an item has a duty charge. You can also review duty charges on an invoice at the Invoice Detail Charges screen, available by selecting *Invoices* in standard Order Inquiry and advancing to the invoice detail level.

> **Note:**
>
> Duty does not appear on your pick slip without customization. Contact your Order Management System representative for more information.

How to display this screen: Select *Duty Rates* for a country at the *Work with Countries Screen*.

Field	Description
Country	The code representing the country where the duty rates apply. Alphanumeric, 3 positions; display-only.
Description	The description associated with the country code. Alphanumeric, 25 positions; display-only.
Harmonize code	The code that associates an item with a duty rate. The system applies duty to an order if the ship-to address is in this country, and if the harmonize code defined for the item or SKU matches a harmonize code defined for a duty rate. If both the item's and the duty rate's harmonize codes are blank, the system considers this a match, and applies the duty rate. You can define harmonize codes for items through *Performing Initial Item Entry (MITM)* or *Updating Harmonize Codes (UPHC)*. Alphanumeric, 16 positions; optional.
Duty amount	The amount of duty to add to the order for the item. The system multiplies this amount by the unit quantity. You can define either a duty amount or a percentage. Numeric, 13 positions with a 2-place decimal; display-only.
Duty percent	The percentage of duty to add to the order for the item. The system adds the percentage of the extended price for the item line. Numeric, 5 positions with a 2-place decimal; display-only.

Screen Option	Procedure
Change a duty rate	Select *Change* for a duty rate to advance to the Change Duty Rates screen. You can change only the Duty percent or Duty amount fields on this screen. See Create Duty Rates Screen for field descriptions.
Delete a duty rate	Select *Delete* for a duty rate.
Display a duty rate	Select *Display* for a duty rate to advance to the Display Duty Rates screen. You cannot change any information on this screen. See Create Duty Rates Screen for field descriptions.
Create a duty rate	Select *Create* to create a new duty rate. See Create Duty Rates Screen.

Create Duty Rates Screen

Purpose: Use this screen to create a duty rate.

How to display this screen: Select *Create* at the Work with Duty Rates Screen.

Field	Description
Country	The code representing the country where the duty rates apply. Alphanumeric, 3 positions; display-only.
Harmonize code	The code that associates an item with a duty rate. The system applies duty to an order if the ship-to address is in this country, and if the harmonize code defined for the item or SKU matches a harmonize code defined for a duty rate. If both the item's and the duty rate's harmonize codes are blank, the system considers this a match, and applies the duty rate; for this reason, a blank harmonize code is a valid value. You can define harmonize codes for items through Performing Initial Item Entry (MITM) or Updating Harmonize Codes (UPHC). Alphanumeric, 16 positions. Create screen: required. Change screen: display-only.
Duty percentage	The percentage of duty to add to the order for the item. The system adds the percentage of the extended price for the item line. You can define either a duty amount or a percentage. Numeric, 5 positions with a 2-place decimal; required if no duty amount is defined.
Duty amount	The amount of duty to add to the order for the item. The system multiplies this amount by the unit quantity. You can define either a duty amount or a percentage. Numeric, 13 positions with a 2-place decimal; required if no duty percentage is defined.

Work with Telephone Number Format Screen

Purpose: Use this screen to define the format for phone numbers. Telephone number formats are defined by country, but each country can have more than one telephone number format.

When an operator enters a phone number, the system compares the number of numeric characters in the phone number with the telephone number formats you have defined. In order to match a format, the phone number must have the same number of numeric positions as a telephone number format. If the system cannot find a match, the phone number does not map to a telephone number format and displays as it was entered by the operator. For this reason, it is useful to consider the different telephone number formats your operators typically use and define a format to cover each.

Telephone Number Format Examples

Example: Telephone number format with a numeric length of 7: 1 2 3 - 4 5 6 7

- 7 position phone number: 5550100
- 5550100 formats to 555 - 0100

Example: Telephone number format with a numeric length of 10: (1 2 3) 4 5 6 - 7 8 9 10

- 10 position phone number: 5085550100
- 5085550100 formats to (508) 555 - 0100

Example: Telephone number format with a numeric length of 11: 1 (2 3 4) 5 6 7 - 11 10 9 8

- 11 position phone number: 15085550100
- 15085550100 formats to 1 (508) 555 - 0100

How to display this screen: Select *Phone Format* for a country.

Field	Description
Country	The country code and description associated with the phone format. Country code: Alphanumeric, 3 positions; display-only. Country description: Alphanumeric, 30 positions; display-only.
Code length	The number of numeric characters in the phone number. Numeric, 3 positions; optional.
Format (Telephone number format)	The telephone number format, illustrated by arranging numbers from 1 to 14 in the same order and position as the numbers in a phone number would display. Enter special characters, such as hyphens or parenthesis, where you would like them to display. *Example:* The telephone number format used in the United States to represent an area code and a local phone number is: (508) 555-0100 When an operator enters a phone number containing 10 numbers (as in the example), the phone number changes to the format defined for 10 numbers, regardless of how the operator entered it into the system. Alphanumeric, fourteen 2-position fields; display-only.

Screen Option	Description
Change a telephone number format	Select *Change* for a telephone number format to advance to the Telephone Number Layout screen in Change mode. You can change the *Formatted telephone number positions* fields on this screen only. See *Telephone Number Layout Screen (Create Mode)* for field descriptions.
Delete a telephone number format	Select *Delete* for a telephone number format.
Display a telephone number format	Select *Display* for the telephone number format to advance to the Telephone Number Layout screen in Display mode. You cannot change any information on this screen. See *Telephone Number Layout Screen (Create Mode)* for field descriptions.
Create a telephone number format	Select *Create*. See *Telephone Number Layout Screen (Create Mode)*.
Map existing phone numbers to the telephone number formats defined.	Select *Submit Reformat*. See *Revising Telephone Number Formats*.

Telephone Number Layout Screen (Create Mode)

Purpose: Use this screen to create a telephone number format for a country.

How to display this screen: Select *Create* at the *Work with Telephone Number Format Screen*.

Field	Description
Country	The country associated with the telephone number format you are creating. Alphanumeric, 3 positions; display-only.
Length	The number of numeric characters in the phone number. The maximum number is 14. Numeric, 3 positions. Create screen: required. Change screen: display-only.

Field	Description
Formatted telephone number positions	The order and positions of each of the numbers for a phone number format, including any special characters such as hyphens or parentheses. The first number of the phone number will display where you enter a *1*, the second number will display where you enter a *2*, etc. *Example:* Create a United States phone number containing an area code and local phone number as: (1 2 3) 4 5 6 - 7 8 9 10 A message similar to the following indicates if you enter a telephone number format that includes a numeric length already defined for that country: `Telephone Number Format already exists.` **Note:** If an operator enters a phone number containing a length that has not been defined in a telephone number format, the system will not format the phone number and it will display as it was entered by the operator. Alphanumeric, fourteen 2-position fields; optional.

Instructions:

1. Enter the numeric length of the telephone number format in the *Length* field.
2. Enter the telephone number format in the *Formatted telephone number positions* fields, indicating where each number of the phone number should display. Include any special characters, such as hyphens or parentheses in the format. Use the Unformatted Telephone Number Positions fields as a guideline. See the field descriptions for examples.

Revising Telephone Number Formats

Submitting reformat: Select *Submit Reformat* at the *Work with Telephone Number Format Screen* to submit a batch program. This program revises existing phone numbers to the telephone number formats defined on the screen. You must confirm the submission at the Confirm Accept pop-up window.

Only phone numbers containing the same length as a telephone number format will be revises. For example, if a telephone number format with a length of 10 is defined as: (1 2 3) 4 5 6 - 7 8 9 10, any telephone number with a length of 10 will be revised so that the first 3 positions are in parentheses and a hyphen is between the sixth and seventh numbers.

Work with States Screen

Purpose: Use this screen to define the state codes for a country. The system prevents you from entering a customer address if the state and country do not match, based on your entries here.

How to display this screen: Select *States* for a country at the *Work with Countries Screen*.

Field	Description
Country	The country code associated with the states. Alphanumeric, 3 positions; display-only.
State	A code that defines a state within a country. Alphanumeric, 2 positions; optional.
Description	The name of the state. Alphanumeric, 25 positions; display-only.
VAT exempt flag	This flag controls whether shipments to this state are exempt to VAT *only* if the *Tax Included in Price (E70)* system control value is *selected*; in this case, the system uses the tax-inclusive price for an item and adds a Hidden tax, if applicable, to the order line. If this system control value is *unselected*, or if the state is exempt from VAT, the system adds tax to the order in the Tax bucket, and does not check this field when determining whether to charge tax on an order. Valid values are: • *Y* = Shipments to this state are exempt from VAT if the *Tax Included in Price (E70)* system control value is *selected*; the regular item price will be used, rather than the tax-inclusive price, and any tax on the order will be added to the Tax bucket. The system will check the postal code first, and then the SCF, to find the appropriate tax rate for the order. • *N* (default) = Shipments to this state are subject to VAT if the *Tax Included in Price (E70)* system control value is *selected*; the tax-inclusive price will be used, and any applicable tax for an item will appear in the Hidden tax field on the order line. This setting defaults to *unselected* if there is a *VAT percent (Value added tax percentage)* defined for the country; otherwise, it defaults to *selected*. Display-only.

Screen Option	Description
Change the description or VAT exempt flag for a state	Select *Change* for a state to display the Change State screen. You can change only the *Description* and *VAT exempt flag* fields on this screen. See *Create State Screen* for field descriptions.
Delete a state	Select *Delete* for a state.
Create a state	Select *Create* to display the *Create State Screen*.

Create State Screen

Purpose: Use this screen to create a state code for a country.

How to display this screen: Select *Create* at the *Work with States Screen*.

Field	Description
Country	The country associated with the state. Alphanumeric, 3 positions; display-only.

Field	Description
State code	A code that defines a state within the country. For countries that do not require states, you should create one state record with a state code of **. Then, when you create SCF and postal codes for the country, you assign each to this state code. Alphanumeric, 2 positions. Create screen: required. Change screen: display-only.
Description	The description of the state you are creating. Alphanumeric, 25 positions; required.
VAT exempt flag	Controls whether shipments to this state are exempt from VAT. The system checks this flag *only* if the *Tax Included in Price (E70)* system control value is *selected*; in this case, the system uses the tax-inclusive price for an item subject to VAT and adds a Hidden tax, if applicable, to the order line. If this system control value is *unselected*, or if the state is VAT-exempt, the system adds any applicable tax to the order in the Tax bucket, and does not check this field when determining whether to charge tax on an order. Valid values are: 1. *Selected* = Shipments to this state are exempt from VAT if the *Tax Included in Price (E70)* system control value is *selected*; the regular item price will be used, rather than the tax-inclusive price, and any tax on the order will be added to the Tax bucket. The system will check the postal code first, and then the SCF, to find the appropriate tax rate for the order. 2. *Unselected* = Shipments to this state are subject to VAT if the *Tax Included in Price (E70)* system control value is *selected*; the tax-inclusive price will be used, and any applicable tax for an item will appear in the Hidden tax field on the order line. This field defaults to *unselected* if there is a *VAT percent (Value added tax percentage)* defined for the country; otherwise, it defaults to *selected*.

Note:

When you create a state, you must also define an SCF code and postal code for the state or Order Entry, Maintenance and Catalog Requests display an error message similar to the following:

Invalid state (FL) for zip. Valid states are: (MA)

See *Working with SCF Codes (WSCF)* for more information on SCF's, and *Setting Up the Zip/City/State (Postal Code) Table (WZIP)* for more information on postal codes.

Setting Up the Zip/City/State (Postal Code) Table (WZIP)

Purpose: The Zip/City/State (postal code) table includes the city, state or province, country, tax rates, and geographic zone for postal areas. The city and state or province you enter for a customer in Order Entry or Order Maintenance are validated against this table.

Creating postal code records: You can use the Work with Postal Codes function to enter the information yourself, or purchase it from the U.S. Postal Service to build the table in your database. If you purchase the information from the U.S. Postal Service, use the *Load USPS Zip Code File (LZPS)* option to upload the data to the Zip/City/State table.

> **Note:**
>
> The *Load USPS Zip Code File (LZPS)* option does not create Zip/City/State Tax Rate records; it only creates Zip/City/State (postal code) records.

Tax rates: You need to set up this table to set up tax rates and, for Canadian addresses, tax calculation methods, if you do not use an external tax system. Even if you use an external tax system, you might still want to establish the Zip/City/State table to help reduce other application errors or to provide an alternative means of calculating tax when there is a communication problem. See About Tax Rates.

> **Note:**
>
> The *City* name must be all upper case in order for the tax rate to apply.

Geographic zones: The Zip/City/State table can be used to identify the geographic zone of a shipping address. Geographic zones are used to divide the country into shipping regions for the purpose of restricting the shipment of weather-sensitive inventory such as plant stock. See Shipping Zone Reservation Overview.

Delivery codes: Some shippers, such as UPS, charge different rates based on the type of delivery address on an order. For example, shipping to a business address is cheaper than shipping to a residential address. You can define the delivery code for a postal area to insure that the best possible rate is charged for shipping an order.

The information you enter through this menu option is not unique to a particular company; it applies to all companies on your system.

Postal code required? The Require postal code? flag in the Country table controls whether a postal code is required for customer addresses. See *Setting Up the Country Table (WCTY)* for background.

In this topic:

- *Work with Postal Codes Screen*
- *Create Postal Code Screen*
- *About Tax Rates*
- *Work with Zip Tax Rates Screen*
- *Update Postal Codes by Range Screen*

Not in this topic:

- *Automatic fill-in of city and state in order entry:* If you set the *Use Zip/City/State Defaulting? (B13)* system control value to *Y*, the system fills in a customer's city and state in Order Entry or Order Maintenance based on the postal code you enter.

- *Tax jurisdictions:* You can track tax activity for tax jurisdictions within states. You define a tax jurisdiction as a range of postal codes. See *Working with Tax Jurisdiction (WTXJ)*.
- *Postal code formats for pick slips:* In order for a postal code to print on pick slips or gift acknowledgments, you must first define the postal code format. See *Working with Postal Code Formats (WPCF)*.

Work with Postal Codes Screen

How to display this screen: Enter *WZIP* in the Fast path field at the top of any menu or select Work with Postal Codes from a menu.

Field	Description
Postal code	The postal code or zip code representing a delivery area. Alphanumeric, 10 positions; optional.
City	The city where the customer receives mail or shipments. Alphanumeric, 25 positions; optional.
State	The state or province where the customer receives mail or shipments. States are defined in and validated against the State table, which is accessible through the Work with Country Table menu option; see *Work with States Screen*. Alphanumeric, 2 positions; optional.
Description	The description of the state, as set up through the *Work with States Screen*. Alphanumeric, 25 positions; display-only.
Delivery code	A code representing the type of delivery address for a postal code. Valid values are: • *B* = Business address. • *R* = Residence. • *N* = No distinction. • ' ' = Blank. Some shippers, such as UPS, charge different rates based on the type of delivery address on an order. For example, shipping to a business address is cheaper than shipping to a residential address. You can define the delivery code for a postal area to insure that the best possible rate is charged for shipping an order. The system uses the following logic to default a delivery code to a customer address on an order: • The system defaults the delivery code defined for the postal code on the address. • If a delivery code has not been defined for the postal code on the address, the system defaults the delivery code from the Customer table. • If a delivery code has not been defined in the Customer table, the *Default Delivery Code for New Order Entry Customers (D13)* defaults. Alphanumeric, 1 position; display-only.

Screen Option	Procedure
Change postal code information	Select *Change* for a postal code to advance to the Change Postal Codes screen. See the *Create Postal Code Screen* for field descriptions.
Delete a postal code	Select *Delete* for a postal code.
Display a postal code	Select *Display* for a postal code to advance to the Display Postal Code screen. You cannot change any information on this screen. See the *Create Postal Code Screen* for field descriptions.
Work with tax rates	Select *Work with tax rates* for a postal code to advance to the *Work with Zip Tax Rates Screen*.
Create a postal code	Select *Create* to advance to the *Create Postal Code Screen*.
Update a postal code range	Select *Updt Pst Cd Range* to advance to the *Update Postal Codes by Range Screen*.

Create Postal Code Screen

Purpose: Use this screen to create a postal code.

How to display this screen: Select *Create* at the *Work with Postal Codes Screen*.

Field	Description
Postal code	The postal code or zip code representing a delivery area. The first three positions of your entry must match a valid SCF for the state and country. See *Working with SCF Codes (WSCF)* for background. Alphanumeric, 10 positions. Create screen: required. Change screen: display-only.
City	The city where a customer receives mail or shipments. The *City* name must be all upper case in order for the tax rate from the *Work with Zip Tax Rates Screen* to apply. Alphanumeric, 25 positions. Create screen: required. Change screen: display-only.
State	The code representing the state where the customer receives mail or shipments. State codes are defined in and validated against the State table, accessible at the *Work with States Screen* through the Work with Countries menu option. This code is required if the Require state? flag for the country is *selected*. The system validates that your entry is a state assigned to the SCF derived from the first three positions of the postal code. See *Working with SCF Codes (WSCF)*. Alphanumeric, 2 positions. Create screen: may be required. Change screen: display-only.

Field	Description
Country	A code representing a country. Country codes are defined in and validated against the Country table; see *Setting Up the Country Table (WCTY)*. The system defaults the *Default Country for Customer Address (B17)*. Alphanumeric, 3 positions; required.
Delivery code	A code representing the type of delivery address for a postal code. Valid values are: • *Business* • *Residential* • *No Distinction* • *Blank* Some shippers, such as UPS, charge different rates based on the type of delivery address on an order. For example, shipping to a business address is cheaper than shipping to a residential address. You can define the delivery code for a postal area to insure that the best possible rate is charged for shipping an order. When the system defaults a delivery code to a customer address on an order, it uses: 1. The delivery code for the postal code on the address if any; otherwise, 2. The delivery code from the Customer table, if any; otherwise; 3. The *Default Delivery Code for New Order Entry Customers (D13)*. Optional.
Geographic zone	A code representing a geographic region. Geographic zones are used to divide the country into shipping regions for the purpose of restricting the shipment of weather-sensitive inventory such as plant stock. Geographic zones are used in conjunction with zone reservation codes, assigned to items or SKUs, to control item reservation in order entry. Zone reservation coded items/SKUs are not reserved during order entry; instead they are reserved during pick generation, at an optimal time for shipping. Zone reservation logic requires: • The item/SKU must be assigned a zone reservation code. • The offer associated with the order must be assigned a season code. • The shipping address for the order must be assigned to a geographic zone, using either the postal zip code of the ship to address, or the SCF (Sectional Center Facility) code of the ship to address. The SCF code consists of the first three digits of the zip code. See Working with SCF/Ship Via Values (WSHV). • For each zone reservation code, you must define zone date windows for all geographic zones in the country. See Shipping Zone Reservation Overview for a discussion. Alphanumeric, 3 positions; optional.
Store tax code	The cross-reference to the corresponding tax code in a point-of-sale system. This field is available only if you have defined a *Default Location for ORCE Integration (K69)*. Alphanumeric, 8 positions; optional.

About Tax Rates

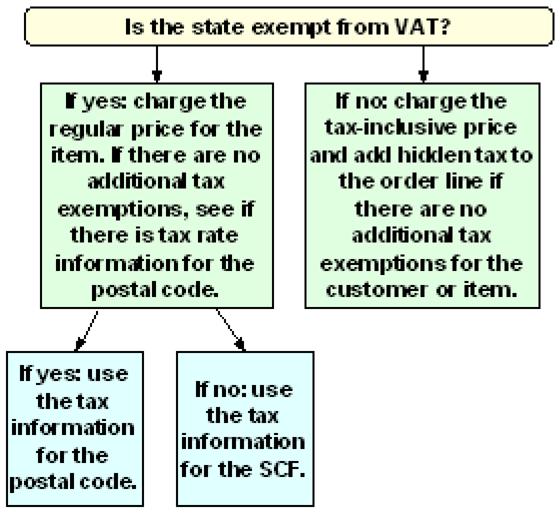
Purpose: The basic steps that the system takes in calculating tax are outlined below. Also presented below are a summary of the places where you can define tax rates, methods, and exemptions.

The system follows two basic paths in evaluating each order for tax depending on whether you process orders that are subject to VAT.

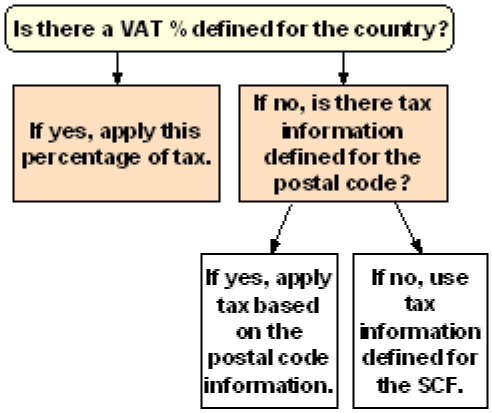
VAT is a taxing method that applies in only certain states in countries. When an order is subject to VAT, the customer is charged a tax-inclusive price, and the tax amount is “hidden” on the order detail line for the item, not included in the Tax bucket for the order.

> **Note:**
>
> You cannot use both an external tax system and tax-inclusive pricing (VAT) in the same company.

Tax-inclusive pricing? If the *Tax Included in Price (E70)* system control value is *selected*, the system follows the steps presented below in determining how to calculate tax on an order.



If the *Tax Included in Price (E70)* system control value is *unselected*, the system follows the steps presented below in determining how to calculate tax:



The system follows the steps above only if you are not using an external tax system.

Tax exemptions: Any of the following tax exemptions might prevent an order or an item from being taxed:

- customer tax exemptions or overrides (see *Working with Customer Tax Status*)
- the VAT exempt flag for the item/SKU (see *Working with Existing Items (MITM)*)
- item tax exemptions and exceptions for U.S. states (see *Working with Item Tax Exemptions (WITX)*)
- GST and PST item exemptions and exceptions for Canadian provinces (see *Working with GST Tax Exemption Status (MGTX)*)
- the *S/H exclude tax?* field for a special handling format (see *Establishing Additional Charge Codes (WADC)*)

> **Note:**
>
> VAT does not apply to an order unless a tax rate is specified for the SCF for the shipping address.

Upper and lower case? The *City* name must be all upper case in order for the tax rate to apply.

Work with Zip Tax Rates Screen

Purpose: Use this screen to work with tax information for shipments to a postal code.

How to display this screen: Select *Work with tax rates* for a postal code at the *Work with Postal Codes Screen*.

Note:

- The system does not consider the settings at this screen if you use an external tax system unless the *Use Standard Tax Calc if Tax Interface Communication Fails (J13)* system control value is selected and the integration with the external tax system fails.
- The system automatically creates a zip tax rate record if you update postal codes by range (*Updt Pst Cd Range* at the *Work with Postal Codes Screen*). The zip tax rate's effective date is the date when you process this update. See *Update Postal Codes by Range Screen*.
- Uploading postal code information through the *Load USPS Zip Code File (LZPS)* option does not automatically create zip tax rate records.
- The *City* name must be all upper case in order for the tax rate to apply.

Field	Description
Effect date (Effective date)	The date when this tax information became effective for orders in this postal code. Whenever you perform pick slip preparation, bill, or maintain the order, the system calculates tax based on the tax rates in effect when the order was first entered. Numeric, 6 positions; optional.

Field	Description
Tax rate	The tax rate for the postal code. Numeric, 5 positions with a 2-place decimal; optional.
GST rate	The rate of Canadian Goods and Services tax for this province. If there is not a GST rate defined for the postal code, but a GST/PST tax method is defined, the system uses the default GST Rate (A90). Numeric, 5 positions with a 2-place decimal; optional.
PST rate	The rate of the Canadian Provincial Services tax for this province. Numeric, 5 positions with a 2-place decimal; optional.
GST/PST method	A code that determines the method of calculating total tax on goods shipped to Canadian provinces. This calculation method varies depending on the province where you are shipping the order. Valid codes for this field are: • *Calculate GST First* (Goods and Services Tax) = Calculate the GST on the order, including freight and handling, if applicable. Add this amount to the order total, then calculate the PST on the result. Calculation (where O = the order total subject to tax): `O * GST rate = GST amount` `GST amount + ((GST amount + O) * PST rate) = order tax` *Example:* The order total subject to tax = $10.00 GST rate = 10% PST rate = 5% $10 * 10% = $1.00 GST amount $1 GST amount + (($1 + $10) * 5%) = $1 + ($11 * 5%) = $1.60 • *Calculate PST First* (Provincial Services Tax) = Calculate the PST on the order, including freight and handling, if applicable. Add this amount to the order total, then calculate the GST on the result. Calculation (where O = the order total): `O * PST rate = PST amount` `PST amount + ((PST amount + O) * GST rate) = order tax` *Example:* The order total subject to tax = $10.00 GST rate = 10% PST rate = 5% $10 * 5% = $.50 PST amount $.50 PST amount + (($.50 + $10) * 10%) = $.50 + ($10.50 * 10%) = $1.55

Field	Description
	• *Calculate PST/GST Separately* = Calculate GST and PST separately; neither tax is subject to the other. Calculation (where O = the order total) `S = (O * GST) + (O * PST)` *Example:* The order total subject to tax = $10.00 GST rate = 10% PST rate = 5% ($10 * 10%) + ($10 * 5%) = $1 + $.50) = $1.50 Optional.
Tax freight	Indicates whether the shipping charges on the order are taxed (Frt and Frt+ amounts). Valid values are: • *Yes* = The customer pays tax on freight. • *No* = The customer does not pay tax on freight. **Note:** This flag acts as an override to the *Tax on Freight (B14)* system control value if the system control value is *selected*. If the order uses the tax rate for the postal code, but the *Tax on Freight (B14)* field is unselected, the system uses the value from the System Control table. If the system control value is *unselected*, you cannot override this value by selecting it here.
Tax handling	Indicates whether handling charges on the order are taxed (special handling, guaranteed service charges, and other handling charges). • *Yes* = The customer pays tax on the handling charges. • *No* = The customer does not pay tax on the handling charges. This flag acts as an override to the same setting for the SCF; see *Working with SCF Codes (WSCF)*, and the Tax on Handling (B15) system control value if the system control value is *selected*. If the order uses the tax rate for the postal code, but the Tax on Handling (B15) field is unselected, the system uses the value from the System Control table. If the system control value is *unselected*, you cannot override this value by selecting it here. • If the *S/H exclude tax?* field for the special handling code is *selected*, the handling charge is not evaluated for tax.

Screen Option	Procedure
Change existing tax rate information	Type over the information you want to change, or just delete existing information. You can change any field but the *Effect date (Effective date)*.
Delete tax rate information	Select *Delete* for a tax rate record.
Switch to ADD Mode	Select *Add*.

Update Postal Codes by Range Screen

Purpose: Use this screen to update postal code information, such as delivery code and tax information, for a range of postal codes.

How to display this screen: Select *Updt Pst Cd Range* at the *Work with Postal Codes Screen*.

Field	Description
Country	A code representing a country. Country codes are defined in and validated against the Country table. The system defaults the *Default Country for Customer Address (B17)*. Alphanumeric, 3 positions; required.
Postal code range	The range of postal codes you wish to update. Enter the beginning postal code in the From range field and ending postal code in the To range field. An error message similar to the following indicates if you enter a postal code in the To field that is greater than the postal code in the From field: `From zip (01601) is greater than to zip (01600).` Numeric, 5 positions; required.
	The system requires entry in one of the following fields:
Delivery code	A code representing the type of delivery address for the range of postal codes. Valid values are: • *Business* • *Residential* • *No Distinction* • *Blank* Some shippers, such as UPS, charge different rates based on the type of delivery address on an order. For example, shipping to a business address is cheaper than shipping to a residential address. You can define the delivery code for a postal area to insure that the best possible rate is charged for shipping an order. The system uses the following logic to default a delivery code to a customer address on an order: • The system defaults the delivery code defined for the postal code on the address. • If a delivery code has not been defined for the postal code on the address, the system defaults the delivery code from the Customer table. • If a delivery code has not been defined in the Customer table, the *Default Delivery Code for New Order Entry Customers (D13)* defaults. Optional.
Tax rate	The tax rate for the postal code. Numeric, 5 positions with a 2-place decimal; optional.

Field	Description
GST rate	The rate of Canadian Goods and Services tax for this province. If there is not a GST rate defined for the postal code, but a GST/PST tax method is defined, the system uses the default GST Rate (A90). Numeric, 5 positions with a 2-place decimal; optional.
PST rate	The rate of the Canadian Provincial Services tax for this province. Numeric, 5 positions with a 2-place decimal; optional.
GST/PST method	A code that determines the method of calculating total tax on goods shipped to Canadian provinces. This calculation method varies depending on the province where you are shipping the order. Valid codes for this field are: • *Calculate GST First* (Goods and Services Tax) = Calculate the GST on the order, including freight and handling, if applicable. Add this amount to the order total, then calculate the PST on the result. • *Calculate PST First* (Provincial Services Tax) = Calculate the PST on the order, including freight and handling, if applicable. Add this amount to the order total, then calculate the GST on the result. • *Calculate GST/PST Separately* = Calculate GST and PST separately; neither tax is subject to the other. See *GST/PST method* for an example of each GST/PST method. Optional.
Tax freight?	Indicates whether the shipping charges on the order are taxed (Frt and Frt+ amounts). Valid values are: 1. *Selected* = The customer pays tax on freight. 2. *Unselected* = The customer does not pay tax on freight. **Note:** This flag acts as an override to the *Tax on Freight (B14)* system control value if the system control value is *selected*. If the order uses the tax rate for the postal code, but the *Tax on Freight (B14)* field is unselected, the system uses the value from the System Control table. If the system control value is *unselected*, you cannot override this value by *selecting* it here.
Tax handling?	Indicates whether special handling charges on the order are taxed (special handling, guaranteed service charges, and other handling charges). • *Selected* = The customer pays tax on the handling charges. • *Unselected* = The customer does not pay tax on the handling charges. • This flag acts as an override to the Tax on Handling (B15) system control value if the system control value is *selected*. If the order uses the tax rate for the postal code, but the Tax on Handling (B15) field is unselected, the system uses the value from the System Control table. If the system control value is *unselected*, you cannot override this value by *selecting* it here. • If the *S/H exclude tax?* field for the special handling code is *selected*, the handling charge is not evaluated for tax.

Field	Description
Geographic zone	A code representing a region of the country. Geographic zones are used to divide the country into shipping regions for the purpose of restricting the shipment of weather-sensitive inventory such as plant stock. Geographic zones are used in conjunction with zone reservation codes, assigned to items or SKUs, to control item reservation in order entry. Zone reservation coded items/SKUs are not reserved during order entry; instead they are reserved during pick generation, at an optimal time for shipping. Zone reservation logic requires: • The item/SKU must be assigned a zone reservation code • The offer associated with the order must be assigned a season code • The shipping address for the order must be assigned to a geographic zone, using either the postal zip code of the ship to address, or the SCF (Sectional Center Facility) code of the ship to address. The SCF code consists of the first three digits of the zip code. See Working with SCF/ Ship Via Values (WSHV). • For each zone reservation code, you must define zone date windows for all geographic zones in the country. See Shipping Zone Reservation Overview. Alphanumeric, 3 positions; optional.

Setting Up Customer Profiles (WPFL)

Customer profiles let you define the demographics you want to capture for your customer base and define the valid responses for these categories. You can also establish default codes that represent the most common profile characteristics of your customer base. For example, assume that a profile for marital status includes married, single, divorced, etc., as valid options, and that the majority of people who place orders are single. If you set a profile default for the single option, this value appears on new customer orders. You would then need to perform data entry in the marital status field for new customers only if the customer were not single.

Mandatory categories: If there is a profile category that you want to capture for each new customer, you can define that category as mandatory. When you enter an order for a customer who has not provided you with this information, the *Work with Customer Profile Screen* appears automatically when you select *Accept* or *Accept/Add Rcp* to accept the order.

> **Note:**
>
> If the *Alternate ID Required for Displaying Customer Profile (K87)* system control value is *selected*, you automatically advance to the Work with Customer Profile screen in order entry and maintenance only if an Alternate customer number is defined for the sold to customer on the order.

Sending profile data to Oracle Retail Customer Engagement:

- *Customer Engagement Customer Integration*: The customer's profile data is included in the information synchronized between Order Administration and Oracle Retail Customer Engagement, provided the *Send Profile Data to ORCE (L51)* system control value is selected and you have completed the setup described under *Order Management System Customer Profile > Customer Engagement Attribute Definition*.

- *Customer Engagement Batch Customer and Sales Integration*. The customer's profile data is included in the information sent to Oracle Retail Customer Engagement provided you have completed the setup described under *Order Management System Customer Profile > Customer Engagement Attribute Definition*. The *Send Profile Data to ORCE (L51)* system control value does not apply to the sales integration.

In this topic:

- *Work with Profile Categories Screen*
- *Create Profile Screen (Creating a Category)*
- *Work with Profile Data Screen (Category Responses)*
- *Create Profile Data Screen (Category Responses)*

Work with Profile Categories Screen

How to display this screen: Enter *WPFL* in the Fast Path field at the top of a menu, or select Work with Demographic Profiles from a menu.

Field	Description
Code	A number you assign to a demographic profile category. Numeric, 3 positions; optional.
Description	The description of the demographic profile category. Alphanumeric, 20 positions; optional.
Mandatory	This flag indicates whether to prompt the operator to complete this field in Order Entry if the customer has not yet provided you with this information. Valid values are: • *Yes* = Prompt for this information in Order Entry by displaying the Work with Customer Profile screen automatically. **Note:** If the *Alternate ID Required for Displaying Customer Profile (K87)* system control value is *selected*, you automatically advance to the Work with Customer Profile screen in order entry and maintenance only if an Alternate customer number is defined for the sold to customer on the order. • *No* = Do not prompt for this information in Order Entry. The system also prompts you in Order Maintenance if the *Prompt for Mandatory Demographics in Order Maintenance (E60)* system control value is *selected*. Optional.

Screen Option	Procedure
Create a profile category	Select *Create* to advance to the *Create Profile Screen (Creating a Category)*.

Screen Option	Procedure
Change a profile category	Select *Change* for a profile category to advance to the Change Profile screen. You can change only the description and the mandatory flag. See *Create Profile Screen (Creating a Category)* for field descriptions.
Delete a profile category	Select *Delete* for a profile category.
Work with valid profile responses	Select *Profile Options* for a profile category to advance to the *Work with Profile Data Screen (Category Responses)*.

Create Profile Screen (Creating a Category)

How to display this screen: At the *Work with Profile Categories Screen*, Select *Create*.

Field	Description
Profile code	A number that represents a demographic profile category. Numeric, 3 positions. Create screen: required. Change screen: display-only.
Description	The description of the demographic profile category. The system does not prevent you from creating more than one profile code with the same description. Alphanumeric, 20 positions; required.
Mandatory	This flag indicates whether to prompt Order Entry operators to collect this information if the customer has not already provided it. Valid values are: • *Selected* = Prompt for this information in Order Entry by advancing to the Work with Customer Profile screen automatically if the customer has not provided you with a response. **Note:** If the *Alternate ID Required for Displaying Customer Profile (K87)* system control value is *selected*, you automatically advance to the Work with Customer Profile screen in order entry and maintenance only if an Alternate customer number is defined for the sold to customer on the order. • *Unselected* = Do not prompt for this information in Order Entry. The system will also advance to the *Work with Customer Profile Screen* automatically in Order Maintenance if the *Prompt for Mandatory Demographics in Order Maintenance (E60)* system control value is *selected*. **Note:** The system does not prompt you for a mandatory profile category if you define a default response for the category; instead, the system will update the customer record with the default value automatically, behind the scenes.

Work with Profile Data Screen (Category Responses)

Purpose: Use this screen to create, change, or delete valid responses for a profile category.

How to display this screen: Select *Profile Options* for a profile category at the Work with Profile Categories Screen.

Field	Description
Code	A number from 1 through 9 that you assign to a profile response. Alphanumeric, 1 position; optional.
Description	The description of the profile response. Alphanumeric, 20 positions; optional.
Default?	A flag that determines whether the system defaults this response automatically when you create or change demographic information for a customer. You can override this default value. • *Yes* = Defaults when you advance to the Work with Customer Profile Screen in Order Entry, Order Maintenance or Customer Maintenance. • *No* = Does not default.

Screen Option	Procedure
Create a response code	Select *Create* to advance to the Create Profile Data Screen (Category Responses).
Delete a response code	Select *Delete* for a code.
Change a response code	Select *Change* for a code to advance to the Change Data Option screen. You can change the description or the default flag for a profile data option. See Create Profile Data Screen (Category Responses) for field descriptions.

Create Profile Data Screen (Category Responses)

Purpose: Select *Create* at the Work with Profile Categories Screen.

Field	Description
Profile code	A number that represents a demographic profile category for which you are creating a valid response code. Numeric, 3 positions; display-only.
Profile data code	A user-defined code that represents a valid response for the profile category. For example, if the profile code were income, the profile data code might be 1, representing income less than $20,000. Alphanumeric, 1 position. Create screen: required. Change screen: display-only.

Field	Description
Description	Text that describes the profile data response. *Example:* For the profile category of Income level, you might create profile data codes such as the following: 1 = less than $30,000 2 = $20,000-$69,000 3 = $30,000-$89,000 4 = $40,000-$109,000 5 = more than $149,000 Alphanumeric, 30 positions; required.
Default?	This flag identifies whether to default this code for the profile category. When you establish a default code by *selecting* this setting, the default code appears when you advance to the *Work with Customer Profile Screen* in Order Entry, Order Maintenance, and Customer Maintenance. You can designate only one default response code for each profile category. If you designate a default response for a mandatory category, the system will default this value for customers automatically behind the scenes in Order Entry if the customers have not already supplied you with the correct information; the Work with Customer Profile screen will not display (unless there is an additional mandatory category without a default value designated). The same condition is true for Order Maintenance if the *Prompt for Mandatory Demographics in Order Maintenance (E60)* field in the System Control file is *selected*. • *Selected* = This is the default response code. • *Unselected* = This is not the default response code.

Setting Up the Customer Class Table (WCCL)

Purpose: Use customer classes to create high level groupings of customers. You can use customer class codes to:

- direct offerings to a limited customer group
- restrict item sales to a group of customers (for example, restricting the sale of guns to minors)
- exclude a group of customers from a particular pay type
- set a default for bypassing item reservation for a group of customers
- generate a list of customers for reporting purposes, or segment reports by class code
- trigger a prompt in order entry to complete a user-defined field for customers based on their class

Related system control values: You can define a *Default Customer Class in Order Entry (D63)* in the System Control table for the system to assign automatically to all new customers created through Order Entry. Also, you can use the *Require Customer Class in OE, WCAT, and WCST (H85)* system control value to require the customer class in order entry, order maintenance, catalog requests, and customer maintenance.

Secured feature: The *Maintenance of Customer Class Field (B07)* controls the authority to enter or change the customer class in order entry, order maintenance, catalog requests, and order maintenance.

> **Important:**
>
> If you set the *Require Customer Class in OE, WCAT, and WCST (H85)* system control value to *Y*, a user who does not have authority to the customer class field will not be able to enter or maintain an order or a catalog request, or perform customer maintenance for any customer that does not already have a customer class assigned.

In this topic:

- *Work with Customer Classes Screen*
- *Create Customer Class Screen*
- *Exclude Pay Types by Customer Class Screen*
- *Create Pay Type Exclusions/Customer Class Screen*

For more information:

- *Change Cust Sold to Name & Address Screen*
- *Work with Order Screen*
- *Expand Name/Address Screen*
- *catalog requests: Create Catalog Request Screen*
- *customer maintenance:*
  - *First Create Sold To Customer Screen*

Work with Customer Classes Screen

How to display this screen: Enter *WCCL* in the Fast path field at the top of any menu, or select Work with Customer Classes from a menu.

Field	Description
Class	A code you can use to group customers. Alphanumeric, 2 positions; optional.
Description	The description of the code. Alphanumeric, 30 positions; optional.

Field	Description
Bypass reservation	This code indicates whether customers in this class are restricted to interactive reservation. Valid values are: • *Yes* = Restrict the customers to interactive reservation; they are prohibited from immediate or batch reservation. If a customer is assigned to a class with this setting, then the customer bypasses reservation regardless of the setting of the Bypass res flag set through *Creating and Updating Sold-to Customers (WCST)*. • *No* = No reservation restrictions apply. If a customer is assigned to a class with this setting, then the customer does not bypass reservation unless the Bypass res flag set through *Creating and Updating Sold-to Customers (WCST)* is *selected*. **Note:** Use this flag only if the *Use OROB for Fulfillment Assignment (M31)* system control value is unselected. This system control value uses the Bypass reservation flag to send orders to Order Orchestration for fulfillment assignment. Optional.

Screen Option	Procedure
Create a customer class	Select *Create* to advance to the *Create Customer Class Screen*.
Change customer class information	Select *Change* for a class to advance to the Change Customer Class screen. At this screen you can change the description or the bypass reservation code. See *Create Customer Class Screen* for field descriptions.
Delete a customer class	Select *Delete* for a class.
Establish a pay type exclusion	Select *Pay Type Exclusions* for a class to advance to the *Exclude Pay Types by Customer Class Screen*.

Create Customer Class Screen

To create: Select *Create* at the *Work with Customer Classes Screen*.

Field	Description
Class	The code you use to categorize customers at a high level for reporting purposes. Alphanumeric, 2 positions. Create screen: required. Change screen: display-only.
Description	The description of the class. Alphanumeric, 30 positions; required.
Bypass reservation	This flag indicates whether customers in the class are restricted to interactive reservation, in which you manually assign inventory to orders. Valid values are: • *Selected* = Restrict the customers to interactive reservation; they are prohibited from immediate or batch reservation. If a customer is assigned to a class with this setting, then the customer bypasses reservation regardless of the setting of the Bypass res flag set through *Creating and Updating Sold-to Customers (WCST)*. • *Unselected* = No reservation restrictions apply. If a customer is assigned to a class with this setting, then the customer does not bypass reservation unless the Bypass res flag set through *Creating and Updating Sold-to Customers (WCST)* is *selected*. **Note:** Use this flag only if the *Use OROB for Fulfillment Assignment (M31)* system control value is unselected. This system control value uses the Bypass reservation flag to send orders to Order Orchestration for fulfillment assignment.
Exclude from Rewards	Not implemented.

Exclude Pay Types by Customer Class Screen

Purpose: Use this screen to work with any pay type(s) the customer class is prohibited from using. If you attempt to enter an excluded pay type on an order for a customer in this class, the system displays a message such as the following:

Customer class (99) has been excluded from using pay type (4).

How to display this screen: Select *Pay Type Exclusions* for a class at the Work with Customer Classes Screen.

Field	Description
Pay Type	Represents the method of payment on an order. See *Working with Pay Types (WPAY)*. Numeric, 2 positions; optional.

Screen Option	Procedure
Create a new pay type exclusion for this customer class	Select *Create* to advance to the *Create Pay Type Exclusions/Customer Class Screen*.
Delete a pay type exclusion for a customer class	Select *Delete* for a pay type exclusion.

Create Pay Type Exclusions/Customer Class Screen

To create: Use this screen to create a new pay type exclusion for a customer class.

How to display this screen: Select *Create* at the *Exclude Pay Types by Customer Class Screen*.

To complete this screen: Enter the code representing the pay type from which the class should be excluded. See *Working with Pay Types (WPAY)*.

Setting Up Match Codes (MMCH)

Match codes are unique customer identification codes that consist of selected portions of a customer name, company name, and address information. The system generates a match code for each customer based on positional field contents you include in a match code schematic or algorithm. You can create up to four match codes per customer, including a standard match code and three fraud identification match codes.

The standard match code identifies duplicate customers any time you create a customer through Order Entry, Customer Maintenance, Order Maintenance, or the Catalog Request table. The three fraud match codes identify customers you have included in *Working with Customer Fraud Tables (WCFD)*.

> **Note:**
>
> To avoid duplicate addresses in the system, you must define the standard match code. To identify a customer as a fraud customer, define the three fraud match codes; the system checks for matches in the Fraud table based on three different algorithms.

The system includes an industry standard match code schematic. You can rearrange the fields and modify the field portions that the match code logic draws from to generate a match code. You can also limit the length of the resulting match code display by leaving match code positions blank. However, you cannot exceed the length of the match code algorithm itself, which is 15 positions.

In this topic:

- *Change Match Codes Screen (Maintaining Match Codes)*

- *Display Match Code Summary Screen*
- *Change Match Code Screens*
- *Test Match Code Screen*

Change Match Codes Screen (Maintaining Match Codes)

How to display this screen: Enter *MMCH* in the Fast Path field at the top of a menu or select Change Customer Match Codes from a menu.

Field	Description
Match code	An algorithm that generates a unique customer identifier comprised of selected portions of the customer name, company name, and address. You can generate up to four match code types: • *Standard Match Code* = This match code checks for, and flags, duplicate customer entries. • *Fraud Code 1, Fraud Code 2, or Fraud Code 3* = Fraud match codes identify a customer as a fraud customer when the system finds a matching record in the Fraud table. The three fraud match code types enable the system to check for matches in the Fraud table based on three different algorithms. Required.

Screen Option	Procedure
Select a match code for review	Select a code in the *Match code* field. You advance to the *Display Match Code Summary Screen*. If no match code has been defined, this screen displays only the title and field headings.

Display Match Code Summary Screen

Purpose: Use this screen to review the pattern and structure of a match code. This screen presents the current algorithm, including the field names and field positions that comprise the match code.

How to display this screen: Select a match code value at the *Change Match Codes Screen (Maintaining Match Codes)*.

Field	Description
Match code position	Identifies the position in the match code that each field element occupies. *Example:* In the sample screen above, match code positions 1-3 consist of elements from the customer's first name. Positions 4-6 in the match code consist of elements from the customer's last name. Positions 7-9 in the match code consist of elements from the street address. Positions 10-14 consists of elements from the postal code. Position 15 consists of an element from the customer' s prefix.

Field	Description
Name/address	The name of the field from which the system extracts the match code element. See *Change Match Code Screens* for complete field descriptions, including attributes. You can use: • *Name*, including: • Prefix • First name • Middle initial • Last Name • Suffix • Company • Street Address • Address Line 2 The second line is available for entering an extended address, for use when street address alone is insufficient. • *Apt./Suite* = The Apartment number or Suite number of the delivery address. • *Postal code* = The postal or zip code for this customer. **Note:** This format differs from the zip code format you use in other situations. In most other tables, you include the hyphen when entering an extended zip code (format = xxxxx-xxxx). However, when creating a match code, you disregard the hyphen (format = xxxxxxxxx). • *City* = The city in which the customer lives, or receives mail or shipments. • *St* = The state or province in which the customer lives, or receives mail or shipments.
Field position used	This graphic illustrates the field length and identifies which field positions the match code includes. The ruler at the top of the screen lets you identify the length of any field and the positional values from that field that the match code includes. The words “Position not used” indicate that you did not define positional values for the related match code positions.

Field	Description
	Example: • The first 3 positional values from the customer's first name (identified by an *X* in each field position) are the first 3 positions of the match code • The first 3 positional values from the last name make up positions 4-6 of the match code • The first 3 positional values from the street address are match code positions 7-9 • The first 5 positional values from the postal code make up positions 10-14 • The first positional value from the prefix makes up position 15 Using this algorithm, the system assembles the match code shown below for a customer named John Brown whose street address is 10 Sample Street, and whose zip or postal code is 01609 `JOHBRO10S01609M` See *Change Match Code Screens* for complete field descriptions, including atttributes.

Screen Option	Procedure
Change the match code contents	Select *Change* to change the match code. You advance to the first of the *Change Match Code Screens*.
Test the match code	Select *Test* to advance to the *Test Match Code Screen*.

Change Match Code Screens

Purpose: You use four Change Match Code screens to define or modify a match code.

> **Important:**
>
> Changing a Match Code algorithm results in a complete regeneration of every Sold-to, Ship-to, and Bill-to customer's match code in the Customer Maintenance Table. This process is *extremely time consuming* and prevents your access to tables until it is complete.

How to display this screen: Select *Change* at the *Display Match Code Summary Screen*.

How to interpret this screen: There are 4 screens that display the fields you can select when changing a match code. The subsequent screens are identical to the first, except that the field names and positions change from screen to screen.

One screen provides two rows per field to accommodate the maximum number of field positions available in any given field. However, you identify the positions available within the field by the number of spaces shown.

Field	Description
Match code	The type of match code you are defining. You can define the standard match code, or one of three fraud match codes. Alphanumeric, 30 positions; display-only.
Prefix	A title (such as "Ms." or "Dr.") that belongs before the customer's name. Alphanumeric, 3 positions; optional.
First Name	The customer's first name. Alphanumeric, 15 positions; optional.
Initial	The customer's middle initial. Alphanumeric, 1 position; optional.
Last Name	The customer's last name. Alphanumeric, 25 positions; optional.
Suffix	An addition to the customer's full name (such as "M.D.", "Fr.", or "III"). Alphanumeric, 3 positions, optional.
Company name	The name of the company placing the order Alphanumeric, 30 positions; optional.
Street Address	The name and number of the customer's street address. Alphanumeric, 32 positions; optional.
Address Line 2	The second line available for entering an address, used when street address alone is insufficient. Alphanumeric, 30 positions; optional.
Apartment	The Apartment number or Suite number of the delivery address. The format of this field should always include the abbreviation for apartment (Apt.) or Suite (Ste.) followed by the number. Alphanumeric, 10 positions; optional.
Postal code	The postal or zip code for this customer. The postal code field allows for entry of a maximum 9-digit code. When using a zip code, you may select up to 9 digits of the extended zip code, excluding hyphen. **Note:** This format differs from the zip code format you may use in other areas. In most other tables, you include the hyphen when entering an extended zip code (format = xxxxx-xxxx). However, when creating a match code, you disregard such formatting (format = xxxxxxxxx). Alphanumeric, 9 positions; optional.
City	The name of the city where the customer lives, or receives mail or shipments. Alphanumeric, 25 positions; optional.

Field	Description
St	The state or province where the customer lives, or receives mail or shipments (See *Setting Up the Zip/City/State (Postal Code) Table (WZIP)*). Alphanumeric, 2 positions; optional.

Instructions:

#	Step
1.	Select a field from those available. Select *Next* or *Prev* to move forward or backward between the four screens.
2.	Determine which match code positions you want the field positions to hold. Enter the number of the match code position in the blank provided for the field position. For example, if you want the first three match code positions to consist of the first, third, and fourth positions of the Postal code field, then advance to the screen that displays this field, and enter *1* in the first blank, *2* in the third blank, and *3* in the fourth blank of this field.
3.	When you complete the field selection and position numbering process, select *OK*. The screen displays a warning: `The match code algorithm has changed.` `Are you sure you want to proceed?` If you confirm the change, you return to the *Display Match Code Summary Screen*. When you exit this screen, another pop-up window prompts you to confirm the change again. **Important:** When you select *OK* to confirm the change at the second pop-up window, the system will proceed to modify every match code on file.
4.	If you select *Exit* at this second pop-up window, the system displays a warning: `The match code algorithm has changed.` `To avoid a discrepency, regenerate all` `customer match codes, or return the` `algorithm to its original values.`

Note:

Whether you select *OK* or *Exit*, you return to the Change Match Codes Screen (Maintaining Match Codes) and must repeat the process to correct changes made to the algorithm or to regenerate the match codes.

Test Match Code Screen

Purpose: Use this screen to test a new match code pattern.

How to display this screen: Select *Test* at the *Display Match Code Summary Screen*.

Field	Description
Match code type	The standard match code the system uses to flag duplicate customers. There are four match code types: • Standard Match Code (*M*) • Fraud code 1 (*F1*) • Fraud code 2 (*F2*) • Fraud code 3 (*F3*) Display-only.
Name	The following 5 fields are available for you to enter the customer's full name: **Prefix** A title that belongs before the customer's name, such as "Mrs." or "Dr. The prefix value will print on labels, reports, etc. Alphanumeric, 3 positions; optional. **First Name** The customer's first name. Alphanumeric, 15 positions; optional. **Initial** The initial of the customer's middle name. Alphanumeric, 1 position; optional. **Last Name** The customer's last name. Alphanumeric, 25 positions; required if Company name is not present **Suffix** An addition to the customer's full name (such as "M.D.", "Fr.", or "III"). Alphanumeric, 3 positions; optional.
Company name	The name of the company placing the order. Alphanumeric, 30 positions; required if Last name is not present
Address	The customer's full street address. Alphanumeric, 32 positions; optional.
Apartment	The Apartment number or Suite number of the delivery address. To enter an apartment or suite address: • Type *APT* to indicate an apartment or *STE* to indicate a suite. • Insert a space and type the number of the apartment or suite, for example: *APT 4* or *STE 116*. Alphanumeric, 10 positions; optional.

Field	Description
Postal code/city/st	Three fields are available for you to enter the customer's postal code, city, and state. **Postal code** The postal code or zip code for this customer. Alphanumeric, 9 positions; optional. **City** The city where the customer lives. Alphanumeric, 25 positions; optional. **State** The state or province where the customer lives, or receives mail or shipments. Alphanumeric, 2 positions; optional.
Match code	When you select *OK*, the system generates the match code for the address you entered above. Alphanumeric, 25 positions; display-only.

Setting Up User-Defined Fields (WUDF)

Purpose: Use Work with User Defined Fields to design a screen containing the information you want to collect for a variety of types of records in Order Administration. For example, you can specify information to capture from customers during order entry or through customer maintenance. User-defined fields are available for:

- different customer types
- items, offers, and related tables
- users, companies, and countries
- divisions and entities
- pay types, ship vias, and warehouses

A complete listing is provided in this topic.

Process overview: Before defining the individual user-defined fields, you must first use Work with User Defined fields to create a link to the related table. You can then enter the detailed information that specifies the type of information you want to collect. Then, you can enter information for individual records in the table.

Example: You want to track the language of each country to which you ship orders. To do so:

1. Select *Create* at the Work with User Defined Fields Screen to create the link to the Country table.
2. When you advance to the *Create User Defined Field Screen*, select a table code of *CST* (Customer Sold To) and enter a description.
3. Select *Work with details* for the record at the Work with User Defined Fields screen to advance to the Work with User Defined Field Detail Screen (Defining the Fields).
4. Select *Create* to advance to the Create User Defined Field Detail Screen, where you create a record for “language.”

Prompting in order entry: In the case of sold-to customers, you can have this screen open automatically when you enter an order for new or existing customers. See *Prompting in Order Entry*. For most other types of user-defined fields, you can display this screen by selecting *Work with user fields* for a record at a "Work with" screen. For example, to work with however, the Order Header User Field table is not available through any screen.

In this topic:

- *Prompting in Order Entry*
- *Work with User Defined Fields Screen*
  - *Create User Defined Field Screen*
- *Work with User Defined Field Detail Screen (Defining the Fields)*
  - *Create User Defined Field Detail Screen*

Prompting in Order Entry

The system uses the following two system control values to determine when to prompt for user-defined information for a sold-to customer in order entry:

- User-defined Field Prompting for Existing Customers (D33)
- *Customer Class for User Defined Field Prompting (G04)*

These two system control values work together as follows:

User Defined Field Prompting in Order Entry set to:	Customer Class for User Defined Field Prompting set to:	Result
	a valid customer class	prompts for any new or existing customer in the class who has not yet provided the user-defined information
	blank	prompts for any new or existing customer, regardless of class, who has not yet provided the user-defined information
N	a valid customer class	prompts for a new customer in the class only if you assign the class before completing the header information and selecting *OK* **Note:** If the *Default Customer Class in Order Entry (D63)* system control value is set to this same customer class, each new customer you create will be assigned to the class automatically, and you will always advance to the prompt screen
N	blank	prompts for any new customer

For more information: See:

- Entering user-defined field information: *Work with User Fields Screen*
- Completing user-defined fields in order entry: *Entering User Fields*

Work with User Defined Fields Screen

How to display this screen: Enter *WUDF* in the Fast path field at the top of any menu, or select Work with User Defined Fields from a menu.

Field	Description
Cde(Code)	A code that identifies the table linked to the user-defined fields. Valid values are: • *CST* = Customer Sold To Table (see *Work with Customers Screens (Selecting a Customer)*) • *CMP* = Company (see *Work with Companies Screen*) • *CNT* = Country (see *Work with Countries Screen*) • *CBT* = Customer Bill To (see *Work with Bill To Customers Screen*) • *DIV* = Division (see *Work with Divisions Screen*) • *ENT* = Entity (see *Work with Entities Screen*) • *ITM* = Item (see *Work with Items Screen*) • *IOF* = Item Offer (see *Work with Item Offers Screen*) • *ITW* = Item Warehouse (see *Work with Item Warehouse Screen*) • *OFR* = Offer (see *Work with Offers Screen*) • *OHD* = Order Header (the Order Header User Field table is not available at any screen) • *OTY* = Order Type (see *Work with Order Types Screen*) • *PAY* = Pay Type (see *Work with Pay Types Screen*) • *VIA* = Ship Via (see *Work with Ship Via Screen*) • *SKU* = SKU (see *Work with SKUs Screen*) • *SKO* = SKU Offer (see *Work with SKU Offers Screen*) • *SRC* = Source (see *Work with Source Codes Screen*) • *USR* = User (see *Work with Users Screen*) • *VND* = Vendor (see *Work with Vendors Screen*) • *VIT* = Vendor Item (see *Work with Vendor Item Screen*) • *WHS* = Warehouse (see *Work with Warehouses Screen*) Optional.
Description	The description associated with the table code. Alphanumeric, 25 positions; optional.

Screen Option	Procedure
Create a user defined field	Select *Create*. See Create User Defined Field Screen.

Screen Option	Procedure
Change the description of the link to the Customer Sold To table	Select *Change* for a code to advance to the Change User Defined Field screen. At this screen, you can change only the description. See *Create User Defined Field Screen* for field descriptions. See for information on changing the type of information stored in user defined fields.
Review the code and description of the link	Select *Display* for a code to advance to the Display User Defined Field screen. You cannot change any information at this screen. See *Create User Defined Field Screen* for field descriptions. See *Work with User Defined Field Detail Screen (Defining the Fields)* for information on reviewing the type of information stored in user defined fields.
Create, change, delete or display individual user-defined fields	Select *Work with details* for a code to advance to the *Work with User Defined Field Detail Screen (Defining the Fields)*.

Create User Defined Field Screen

To create: Use this screen to link a user-defined field to appear on the *Work with User Fields Screen*.

How to display this screen: Select *Create* at the *Work with User Defined Fields Screen*.

Field	Description
File code	Identifies the table linked to the user-defined fields. Valid values are: • Add Reason • Bank • Buyer • Cancel Reason • Catalog Request • Company (see *Work with Companies Screen*) • Correspondence History • Country (see *Work with Countries Screen*) • Customer Bill To (see *Work with Bill To Customers Screen*) • Customer Class • Customer Membership • Customer Profile • Customer Ship To • Customer Ship To Entity • Customer Sold To (see *Work with Customers Screens (Selecting a Customer)*) • Customer Sold To Email • Customer Sold To Entity • Customer Warranty Track • Dispute Reason • Division (see *Work with Divisions Screen*) • Entity (see *Work with Entities Screen*) • Exchange Reason • Geographic Zone

Field	Description
	• Hazard • Item (see *Work with Items Screen*) • Item Category • Item Class • Item Offer (see *Work with Item Offers Screen*) • Item Status • Item Transaction Code • Item Transaction History • Item Transaction Reason • Item (SKU) UPC • Item Warehouse (see *Work with Item Warehouse Screen*) • Language • Line of Business • List Source • Location Class • Long SKU Class • Long SKU Department • Long SKU Division • Mail/Call Code • Manifest Upload Audit • Offer (see *Work with Offers Screen*) • Order Detail • Order Header (the Order Header User Field table is not available through any screen) • Order Payment Method • Order Ship To • Order Type (see *Work with Order Types Screen*) • Pay Type (see *Work with Pay Types Screen*)

Field	Description
	• Prep Code • Price Override Reason • Profile Data • Promotion • PO Detail • PO Header • Recency • Retail Class • Return Reason • RI Price Change Hist Detl • RI Price Change Hist Summ • Salesman • Season • Ship Via (see *Work with Ship Via Screen*) • SKU (see *Work with SKUs Screen*) • SKU Element 1 • SKU Element 2 • SKU Element 3 • SKU Offer (see *Work with SKU Offers Screen*) • Soldout Control • Source (see *Work with Source Codes Screen*) • Source Category • Tickler • User (see *Work with Users Screen*) • Vendor (see *Work with Vendors Screen*) • Vendor Item (see *Work with Vendor Item Screen*) • Warehouse (see *Work with Warehouses Screen*) Create screen: required. Change screen: display-only.
File description	The description associated with the table code. Alphanumeric, 25 positions; required.

Note:

You cannot delete the user-defined field link once you create it.

See *Work with User Defined Field Detail Screen (Defining the Fields)* for more information on setting up the individual fields.

Work with User Defined Field Detail Screen (Defining the Fields)

Purpose: Once you create the link to a table, you need to define and sequence the fields available on the new screen. Use this screen to work with the individual fields.

How to display this screen: Select *Work with details* for the link at the *Work with User Defined Fields Screen*.

Field	Description
File code	The code representing the table to which the user-defined fields are linked. Alphanumeric, 3 positions; display-only.
File description (Unlabeled field to the right of the File code field)	The description associated with the table code. Alphanumeric, 25 positions; display-only.
Seq (Sequence)	A value you assign to a field to control its placement on the screen. Typically, you would assign a sequence number of *10* to the field that should appear first, a sequence number of *20* to the field that should appear second, and so on. **Note:** This display sequence number differs from the other sequence number field in the User Defined Field Detail table; this other sequence number is not displayed on any screen, although the system can use it to identify user defined field record types. Numeric, 3 positions; optional.
Field label	The field label to appear on the user-defined field screen in order entry or customer maintenance. **Note:** To support passing user-defined fields through the order API, the field label should be in upper case, and should be passed in the *Inbound Order XML Message (CWORDERIN)* in upper case as well. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Alphanumeric, 15 positions; optional.
Typ (Type)	A code that identifies the type of field. Valid codes are: • *Date* • *Number* • *Text* On the *Enter User Fields Screen* (displayed during Order Entry or from the Sold To Customer table), numeric fields appear on the left side of the screen, text fields appear in the center of the screen, and date fields appear on the right side of the screen. Optional.

Field	Description
Usage	A code that identifies whether you are collecting the field information on the user-defined field screen for sold-to customers in order entry. Valid values are: • *Input* = the system prompts you to enter information in this field in order entry; or, you can use customer maintenance • *Output* = you can enter information in this field in customer maintenance only; it is not available in order entry Optional.

Screen Option	Procedure
Create a new user defined detail field to use when collecting customer information	Select *Create* to advance to the *Create User Defined Field Detail Screen*.
Change the sequence, description or characteristics of a field	Select *Change* for a field to advance to the Change User Defined Field Detail. See *Create User Defined Field Detail Screen* for field descriptions.
Delete a field	Select *Delete* for a field. The Confirm Delete window indicates that customer fields have been created, and that you will lose this information if you continue. Select *Enter* to continue, or select *Exit* to cancel.
Review a field	Select *Display* for a field to advance to the Display User Defined Field Detail screen. You cannot change any information on this screen. See *Create User Defined Field Detail Screen* for field descriptions.

Create User Defined Field Detail Screen

Purpose: Use this screen to specify a new field you will use to collect information.

How to display this screen: Select *Create* at the *Work with User Defined Field Detail Screen (Defining the Fields)*.

Field	Description
File code	The code representing the table to which the user-defined fields are linked. Alphanumeric, 3 positions; display-only.

Field	Description
Seq (Sequence)	A value you assign to a field to control its placement on the screen. Typically, you would assign a sequence number of *10* to the field that should appear first, a sequence number of *20* to the field that should appear second, and so on. **Note:** This display sequence number differs from the other sequence number field in the User Defined Field Detail table; this other sequence number is not displayed on any screen, although the system can use it to identify user defined field record types. Numeric, 3 positions; required.
Field label	The field label to appear on the user-defined field screen. Alphanumeric, 15 positions; required.
Typ (Type)	A code that identifies the type of field. Valid codes are: • *Date* • *Number* • *Text* **Note:** On the *Enter User Fields Screen* (displayed during Order Entry or from the Sold To Customer table), numeric fields appear on the left side of the screen, text fields appear in the center of the screen, and date fields appear on the right side of the screen. Create screen: required. Change screen: display-only.
Usage	A code that identifies whether you are collecting the field information on the user-defined field screen for sold-to customers in order entry. Valid values are: • *Input* = the system prompts you to enter information in this field in order entry; or, you can use a maintenance screen if appropriate • *Output* = you can enter information in this field in maintenance only; it is not available in order entry Required.

Working with Postal Code Formats (WPCF)

Purpose: Use the Work with Postal Code Format function to define the format for printing postal codes on pick slips or gift acknowledgments. Postal codes are defined by country, but each country can have more than one postal code format.

When you print pick slips, the system compares each customer's postal code with the postal code formats you have defined through this function. In order to match a format, the postal code should have the same number of positions and conform in the placement of filler characters, such as hyphens. If the system cannot find a match, no postal code prints on the pick slip. For this reason, it is useful to consider the different postal code formats your operators typically use in Order Entry and define a format to cover each.

In this topic:

- *Work with Postal Code Format Screen*
- *Postal Code Layout Screen*

Work with Postal Code Format Screen

Purpose: Use this screen to work with the formats you have defined for printing postal codes on pick slips or gift acknowledgments.

How to display this screen: Enter *WPCF* in the Fast path field or select *Working with Postal Code Formats (WPCF)* from a menu.

Field	Description
Country	A code to represent the country for the postal code format. Country codes are defined in and validated against the Country table. See *Setting Up the Country Table (WCTY)*. Alphanumeric, 3 positions; optional.
Country description (Unlabeled field to the right of the country)	The description of the country. Alphanumeric, 30 positions; display-only.
Code length	The number of characters in the postal code. Numeric, 3 positions; optional.
Format postal code	The postal code format, illustrated by arranging the ten letters of the word "postalcode" in the same order and position as the characters of the postal code will print on the pick slip. *Example:* The "zip plus 4" postal code used in the United States is represented on this screen as: `POSTA-LCOD` When printed on the pick slip or gift acknowledgment, this postal code would appear in the following format: `01609-1039` Alphanumeric, 10 positions; display-only.

Screen Option	Procedure
Change a postal code format	Select *Change* for a postal code format to advance to the Postal Code Layout screen in Change mode. You can change only the *Formatted postal code positions* fields. See *Postal Code Layout Screen* for field descriptions.
Delete a postal code format	Select *Delete* for a postal code format.
Display a postal code format	Select *Display* for a postal code format to advance to the Postal Code Layout screen in Display mode. You cannot change any information on this screen. See *Postal Code Layout Screen* for field descriptions.
Add a new postal code format for a country	Select *Create*. See *Postal Code Layout Screen*.

Postal Code Layout Screen

To create: Select *Create* at the *Work with Postal Code Format Screen*.

Field	Description
Country	A code to represent the country for the postal code format. Country codes are defined in and validated against the Country table. See *Setting Up the Country Table (WCTY)*. Alphanumeric, 3 positions; required.
Code length	The number of characters in the postal code. The maximum number is ten. Numeric, 3 positions; required.
Formatted postal code positions	The order and position of each of the postal code digits for pick slips or gift acknowledgments, including any hyphens or other "filler" characters. The first digit of the postal code will print where you enter a 1, the second digit will print where you enter a 2, and so on, up to the tenth digit, which will print where you enter a 0. *Example:* Create a United States five-digit postal code format as: 1 2 3 4 5 Create a United States "zip plus 4" postal code format as: 1 2 3 4 5 - 7 8 9 0 Create a Canadian postal code format as: 1 2 3 4 5 6 Alphanumeric, 10 positions; required.
Zip spaces	This field is not currently implemented. Numeric, 1 position; optional.
Zip position	This field is not currently implemented. Valid values: • *After* • *Before* • *Separate* Optional.

Instructions:

1. Complete the *Country* field and the *Code length* field.

2. Enter the postal code format in the *Formatted postal code positions* fields, indicating where each digit of the postal code should print. Include any hyphens or other “filler” characters in your count. See the *Formatted postal code positions* fields for an example.

Working with Mail/Call Codes (WMCC)

Purpose: Use the Mail/Call Code table to define codes that specify how often, and under what conditions, you will call or send mail to customers.

You can define mail and call codes for sold-to and ship-to customers. See *Creating and Updating Customers* for more information on working with different customer types.

> **Note:**
>
> The system defaults the value in the Mail flag field (either Y or N) to the Mail code field when you create or change a sold-to customer. (The Mail flag setting itself defaults from the *Default Mail Name (D10)* system control value.) For this reason, you should define *Y* and *N* as valid mail codes in the Mail/Call Code table, so that the system will accept the default as a valid value in the Mail code field.

In this topic:

- *Work with Mail/Call Code Screen*
- *Create Mail/Call Code Screen*

Work with Mail/Call Code Screen

How to display this screen: Enter *WMCC* in the Fast path or select Work with Mail/ Call Codes from a menu.

Field	Description
Mail/call code	This code defines when, and under what circumstances, you should send mail to or call the customer. The system distinguishes mail codes from call codes by the value in the *Type* field. Alphanumeric, 3 positions; optional.
Description	The description associated with the mail or call code. Alphanumeric, 40 positions; display-only.
Type	Indicates whether this is a mail or call code. Valid values are: • *Call Code* • *Mail Code* Optional.

Screen Option	Procedure
Change a mail or call code	Select *Change* for a mail or call code you want to change to advance to the Change Mail/Call Code screen. You can change only the *Description* and the *Type* fields. See *Create Mail/Call Code Screen* for field descriptions.
Delete a mail or call code	Select *Delete* for a mail or call code.
Display a mail or call code	Select *Display* for a mail or call code to advance to the Display Mail/Call Code screen. You cannot change any information on this screen. See *Create Mail/Call Code Screen* for field descriptions.
Add a new mail or call code	Select *Create*. See *Create Mail/Call Code Screen*.

Create Mail/Call Code Screen

Purpose: Use this screen to create a new mail code or call code.

To create: Select *Create* at the *Work with Mail/Call Code Screen*.

Field	Name
Mail/call code	This code indicates when and under what circumstances to call or send mail to the customer. You cannot use the same code for both a mail code and a call code. The system distinguishes mail codes from call codes based on the value in the *Type* field. Alphanumeric, 3 positions. Create screen: required. Change screen: display-only.
Description	The description associated with the mail or call code. Alphanumeric, 40 positions; required.
Type	Indicates whether this is a mail code or a call code. Valid values are: • *Mail Code* • *Call Code* Required.

Working with Customer Action Reason Codes (WCAR)

Customer action notes are messages about a customer issue or problem that you need to resolve. You use customer action reason codes to identify and group the issues or problems in customer action notes or track when and how often customers report certain issues or problems.

In this topic:

- *Work with Customer Action Reasons Screen*
- *Create Customer Action Reason Screen*

For more information: See *About Customer Action Notes*.

Work with Customer Action Reasons Screen

How to display this screen: Enter *WCAR* in the Fast path field at the top of any menu or select Work with Customer Action Reasons from a menu.

Field	Description
Reason code	This code represents the reason behind the customer issue or problem. Alphanumeric, 2 positions; optional.
Description	A description of the reason code. Alphanumeric, 40 positions; display-only.

Screen Option	Procedure
Change a reason code	Select *Change* for a reason code to advance to the Change Customer Action Reason screen. At this screen, you can change only the customer action reason description. See *Create Customer Action Reason Screen* for field descriptions.
Delete a reason code	Select *Delete* for the reason code to delete it.
Display a reason code	Select *Display* for a reason code to advance to the Display Customer Action Reason Code screen. You cannot change any information on this screen. See *Create Customer Action Reason Screen* for field descriptions.
Create a reason code	Select *Create* to advance to the *Create Customer Action Reason Screen*.

Create Customer Action Reason Screen

Purpose: Use this screen to create a reason code.

How to display this screen: Select *Create* at the *Work with Customer Action Reasons Screen*.

Field	Description
Customer action (Customer action reason code)	This code reason represents the reason behind the customer issue or problem. Alphanumeric, 2 positions. Create screen: required. Change screen: display-only.
Description	A description of the reason code. Alphanumeric, 40 positions; required.

Working with Customer Note Types (WNTY)

Purpose: Use this menu option to set up types of customer notes and the special actions or defaults associated with each. You can review or enter customer notes at the *Edit Customer Notes Screen*, available through Work with Customers or through order entry, order maintenance or standard order inquiry.

The features you can assign to a note type include:

- *Automatic display in order entry:* a pop-up window displays when you select the customer in order entry, or when you maintain the customer's order in order maintenance.
- *Default text:* this text will default into the Note field when you select the note type for a customer. You can override the default if desired.

> **Note:**
>
> The pop-up window displays only when you select the customer as the Sold-to customer on an order, not when the customer is a shipment recipient only (by selecting *Sold To/Rcp.* or *Accept/Add Rcp.*).

How might you use note types? You might use a note type to alert operators to a customer whose payment history may be fraudulent, or any other information about the customer that warrants special attention, such as purchase habits. You can also use the default text feature to save keystrokes when entering "boilerplate" notes for a customer, or to group customers for reporting purposes.

In this topic:

- *Work with Customer Note Type Screen*
- *Create Customer Note Type Screen*

For more information:

- customer notes: *Displaying More Options in OIOM*
- how customer note information displays in a pop-up window in order maintenance: *Selecting an Order for Maintenance*
- how customer note information displays in a pop-up window when you select a customer in order entry: *Selecting Customers in Order Entry*

Work with Customer Note Type Screen

How to display this screen: Enter *WNTY* in the Fast path field at the top of any menu or select Work with Customer Note Types from a menu.

Field	Description
Typ (Type)	The code representing the type of customer note. Alphanumeric, 1 position; optional.
Description	A description of the type code. Alphanumeric, 30 positions; display-only.

Screen Option	Procedure
Create a note type	Select *Create* to advance to the *Create Customer Note Type Screen*.

Screen Option	Procedure
Change a note type	Select *Change* for a note type to advance to the Change Customer Note Type screen. At this screen, you can change any field but the note type code. For a description of the fields on this screen, see *Create Customer Note Type Screen*.
Delete a note type	Select *Delete* for a note type to delete it.
Display a note type	Select *Display* for a note type to advance to the Display Customer Note Type screen. You cannot change any information on this screen. For a description of the fields on this screen, see *Create Customer Note Type Screen*.

Create Customer Note Type Screen

Purpose: Use this screen to create a note type.

How to display this screen: Select *Create* at the *Work with Customer Note Type Screen*.

Field	Description
Type	A code representing the type of customer note. Alphanumeric, 1 positions. Create screen: required. Change screen: display-only.
Description	A description of the type code. Alphanumeric, 30 positions; required.
Default message	The text that should default into the customer note field when you add a note of this type at the *Edit Customer Notes Screen*. This text defaults only if you do not enter any other text into the note field, and you can override or delete defaulted text. You can use the default message text to save keystrokes when entering notes. Alphanumeric, 50 positions; optional.
O/E message	This flag indicates whether the note should display automatically when you select the customer in order entry. The note will also display when you select one of the customer's order for order maintenance. Possible settings are: • *Selected* = Display the note in order entry and order maintenance. • *Unselected* (default) = Do not display the note in order entry and order maintenance.

Working with Language Codes (WLAN)

Purpose: Use this menu option to create, change, or delete a language code. You can assign a language to a customer in *Creating and Updating Sold-to Customers (WCST)*.

> **Note:**
>
> The Work with Language Codes menu option is informational only and is not supported by any functionality in Order Administration.

In this topic:

- *Work with Language Codes Screen*
- *Create Language Code Screen*
- *Change Language Code Screen*

Work with Language Codes Screen

Use this screen to review language codes.

How to display this screen: Enter *WLAN* in the Fast path field or select Work with Language Codes from a menu.

Field	Description
Language	A code that represents a language. Enter a full or partial language code and select *OK* to display language codes in alphanumeric order starting with your entry. Alphanumeric, 3 positions; optional.
Description	A description of the language. Alphanumeric, 30 positions; display-only.

Screen Option	Procedure
Create a language code	Select *Create* to advance to the *Create Language Code Screen*.
Change a language code	Select *Change* for a language code to advance to the *Change Language Code Screen*.
Delete a language code	Select *Delete* for a language code to advance to the Confirm Delete window. Select *Delete* to delete it; otherwise, select *Exit* to cancel.

Create Language Code Screen

Purpose: Use this screen to create a language code.

How to display this screen: Select *Create* at the *Work with Language Codes Screen*.

Field	Description
Language	A code that represents a language. Alphanumeric, 3 positions; required.
Description	A description of the language. Alphanumeric, 30 positions; required.

Change Language Code Screen

To change: Select *Change* at the *Work with Language Codes Screen* to advance to the Change Language Code screen. At this screen, you can change the language description. See the *Create Language Code Screen* for field descriptions.

Creating and Updating Customers

Topics in this part: The following topics describe how to create and maintain customer information on the system through the Customer Maintenance module:

- *Understanding Customer Types* describes the three types of customers you work with throughout the Customer Maintenance module.
- *Selecting Customers* explains how to use the Customer Maintenance Selection Screen to search for existing customer records.
- *Creating and Updating Sold-to Customers (WCST)* describes the Work with Customers screens you use when creating and updating sold-to customers.
- *Creating and Updating Ship-to Customers (WCST)* describes the screens you use when creating and updating ship-to customers.
- *Creating and Updating Bill-to Customers (WCBT)* describes the screens you work with when creating and updating bill-to customers.
- *Work with Contract Price Screen* describes how to establish special contract pricing opportunities for a customer.
- *Working with Customer Tax Status* describes the tax status that you can apply to customers, including standard taxes and exemptions.
- *Working with Pay Type Exclusions* describes how to apply payment method exclusion codes to a customer.
- *Reviewing Customer History* describes how to view a customer's mail history, item history, and order summary and detail history.
- *Work with User Fields Screen* describes how to change, delete, or display information for user-defined fields.
- *Reviewing Customer Address Changes* describes how to display address changes that you enter for your customers.
- *Printing the Customer Exposure Report (PCER)* describes how to print a report listing customer action notes entered and customer action reason codes used on each.
- *Printing the Customer Detail Exposure Report (PCAR)* describes how to print a report listing customer action notes, including details on the customer.
- *Working with Customer Warranty Information (WCST)* describes the screens you use to review and work with items you shipped to customers at no charge, in fulfillment of a warranty.
- *Working with Customer Email Addresses* describes how the system stores and validates email addresses for sold-to customers, and presents the screens you use to work with email addresses.
- *Working with Customer Ownership* describes how to create and update information about the products a customer owns.

- *Working with Alternate Customer Number Cross-References* describes the screens you use to work with additional alternate customer numbers assigned to a customer.
- *Generic Customer API* describes how to create or update customers through a generic XML message.
  For more information see the Order Administration Web Services Guide on https://support.oracle.com My Oracle Support (ID 2953017.1).
- *Customer Engagement Customer Integration* describes how to keep customer information in sync with Oracle Retail Customer Engagement when Oracle Retail Customer Engagement is the system of record for customer data.

Work with Customers (WCST)

For information on:	See:
The different **types of customers** in Order Administration; **background and overview**	*Understanding Customer Types*
Different **scanning and selection** options when you select customers for maintenance or review	*Selecting Customers*
The screens you use to create or update name, address, and other **basic information about a sold-to customer** in the Customer table	*Creating and Updating Sold-to Customers (WCST)*
Reviewing and working with **ship-to customers**	*Creating and Updating Ship-to Customers (WCST)*
Reviewing and working with **bill-to customers**	*Creating and Updating Bill-to Customers (WCBT)*
Establishing **contract pricing** for a customer	*Work with Contract Price Screen*
Working with customer **tax status**, including standard taxes and exemptions	*Working with Customer Tax Status*
Applying **payment method exclusions** for a customer	*Working with Pay Type Exclusions*
Reviewing customer mail, item, and order **history**	*Reviewing Customer History*
Working with **user-defined fields** for customers	*Work with User Fields Screen*
Reviewing customer **address change history**	*Reviewing Customer Address Changes*
Reviewing and working with items shipped to customers at no charge in fulfillment of a **warranty**	*Working with Customer Warranty Information (WCST)*
Reviewing and working with customer **email addresses**	*Working with Customer Email Addresses*
Reviewing and working with information on **products** that the customer owns	*Working with Customer Ownership*

For information on:	See:
Reviewing and working with **alternate customer numbers** used to cross-reference a customer record in Order Administration with records from external systems	*Working with Alternate Customer Number Cross-References*

Creating and Updating Bill-to Customers (WCBT)

Purpose: A bill-to customer represents the person or company that is billed for an order. The system creates a bill-to customer record automatically only when the person being billed for the order is different from the customer who placed the order.

The system stores information on the bill-to customer related to payment arrangements and history; unlike the sold-to customer record, the bill-to customer table does not contain order history information.

Bill-to/sold-to association: Each customer who places orders (the customer sold-to) can be associated with no more than one bill-to customer, but each bill-to customer can be associated with more than one sold-to customer. If a bill-to customer is specified in the *Bill to* field for a sold-to customer, that bill-to will be added to each order that the sold-to customer places, regardless of payment method. See the system control values listed below for more information on the situations when the system automatically updates the *Bill to* field for the sold-to customer.

Related system control values:

- *Create/Assign Bill To Customers in Order Entry (A76)*: determines whether you can assign existing bill-to customers to sold-to customers through Order Entry as well as through Customer Maintenance.
- *Update Bill-to Address with Sold-to Address Changes (E13)*: controls whether to prompt the operator whenever you change a sold-to address to see if the bill-to address should receive the same updates.

In this topic:

- *Work with Bill To Customers Screen*
- *Create Bill-to Customer Screen*
- *Display Duplicate Bill To Window*
- *Change Bill-to Customer Screen*
- *Work with Bill To Phone Numbers Screen*
- *Create Bill To Phone Number Screen*
- *Work with Bill To Notes Screen*
- *Work with Ticklers Screen (bill-to customer view)*

Related system control values: The following system control values control how the system creates new bill-to customers:

- *Create/Assign Bill To Customers in Order Entry (A76)* controls whether the system allows you to assign a bill-to customer to a sold-to customer in Order Entry. In this case, the system uses the sold-to customer information for the new bill-to customer.

- *Allow Order for New Bill-to Without Order Hold (D84)* controls whether orders associated with a new bill-to customer, created automatically by the system in Order Entry, go on *UB* (unreferenced bill-to) hold.

For more information: On order hold reason codes: see *Introducing Order Hold Reason Codes*.

Work with Bill To Customers Screen

How to display this screen: Enter *WCBT* in the Fast path field at the top of any menu or select Work with Bill To Customers from a menu.

Field	Description
Acct #	A unique number assigned by the system to identify the bill-to customer. Numeric, 7 positions; optional.
Name (Last/Company)	**Last Name** The customer's last name. Enter a full or partial last name to list customers who match your entry alphanumerically. Alphanumeric, 25 positions; optional. **Company** The name of the company placing the order. Alphanumeric, 30 positions; optional.
First name	The customer’s first name. Enter a full or partial last name to list customers whose names follow your entry alphanumerically. Enter a full or partial last name and first name to list customers with last names and first names that follow your entry alphanumerically. Alphanumeric, 15 positions; optional.
St (State)	The state or province in which the customer lives or receives mail or shipments. See *Setting Up the Country Table (WCTY)* for more information on state codes. Alphanumeric, 2 positions; optional.
Postal code	The postal or zip code for this customer. Alphanumeric, 10 positions; optional.

Screen Option	Procedure
Create a bill-to customer	Select *Create* to advance to the *Create Bill-to Customer Screen*.
Change bill-to customer information	Select *Change* for a customer to advance to the *Change Bill-to Customer Screen*.

Screen Option	Procedure
Delete a bill-to customer	Select *Delete* for a customer to delete it. When you delete a bill-to customer, you lose the customer's billing account history. **Note:** You cannot delete a bill-to customer that is associated with any unpurged orders or assigned to any sold-to customers.
Display a bill-to customer	Select *Display* for a customer to advance to the First Display Customer Bill To screen. See *Create Bill-to Customer Screen* for descriptions of the fields on this screen.
Work with bill-to phone numbers	Select *Phone #'s* for a customer to advance to the *Work with Bill To Phone Numbers Screen*.
Review customer notes	Select *Notes* for a customer to advance to the *Work with Bill To Notes Screen*.
Work with ticklers associated with the bill-to customer	Select *Ticklers* for a customer to advance to the *Work with Ticklers Screen (bill-to customer view)*.
Review email correspondence history	Select *Email history* for a customer to advance to the *Work with Email by Customer Bill To Number Screen*.
Work with user defined fields	Select *User Field* for a customer to advance to the *Work with User Fields Screen*.

Create Bill-to Customer Screen

Purpose: At the *Work with Bill To Customers Screen*, select *Create* to advance to this screen.

Duplicate bill to customer: The *Display Duplicate Bill To Window* displays if you try to create a bill to customer whose name and address matches an existing bill to customer.

Field	Description
Account #	A unique number to identify a customer billing account. Numeric, 7 positions; display-only, assigned by the system.

Field	Description
Hold/bypass/fraud	Determines the type of credit checking to apply to this customer. Valid values are: • *Hold* = The system places all orders for this customer on hold automatically. You must review each order, then release good orders. • *Bypass* = The system does not credit check orders for this customer. • *Fraud* = This code identifies the customer as a “fraud.” The system adds a record to the Fraud table for the customer and places all orders for the customer on “fraud” hold automatically. You must review each order for this customer, then release good orders. Entering the customer's name in the Fraud table does not by itself add *Fraud* to this field, although the system still holds all of the customer's orders for fraud. See *Working with Customer Fraud Tables (WCFD)*. Optional.
Match code	A code used to identify duplicate customers based on a match on the customer's address. The system assembles a match code for each new customer, and updates the match code when you change any of the related components. Match codes are defined in the Match Code table, and may consist of components of the bill-to customer's name, company name, address and postal code. See *Setting Up Match Codes (MMCH)*. Alphanumeric, 15 positions; display-only.
Name	The following 5 fields are available for you to enter the Bill-To customer's full name: **Prefix** A title (such as "Mrs." or "Dr.") that belongs before the customer's name. The prefix prints on labels, reports, etc. Alphanumeric, 3 positions; optional. **First Name** The bill-to customer's first name. Alphanumeric, 15 positions; optional. **Initial** The customer's middle initial. Alphanumeric, 1 position; optional. **Last Name** The customer's last name. Alphanumeric, 25 positions; required if company name is not present. **Suffix** An addition to the customer's full name (such as "M.D.", "Fr.", or "III"). Alphanumeric, 3 positions, optional.
Company	The name of the customer's company. Alphanumeric, 30 positions; required if last name is not present.

Field	Description
Street	The customer's street address or the number of the customer's post office box (entered as *P.O. Box ###*). This is the primary delivery address. Alphanumeric, 32 positions; required.
Apt/suite (Apartment/ suite)	The apartment or suite number of the delivery address. To enter an apartment or suite address: Type *APT* to indicate an apartment or *STE* to indicate a suite. Insert a space and type the number of the apartment or suite, for example: *APT 4* or *STE 116*. Alphanumeric, 10 positions; optional.
Address	The customer's expanded address. Alphanumeric, three 30-position fields; optional.
Postal code	The postal or zip code for the customer. Required only if the Require postal code? flag is selected for the country. See Setting Up the Country Table (WCTY) for background. Validated against the Zip/City/State (Postal Code) table only if postal code is required. Alphanumeric, 10 positions; required or optional based on country.
City	The city where the customer lives or receives mail or shipments. Alphanumeric, 25 positions; required.
St (State)	The state or province where the customer lives or receives mail or shipments. Required only if the Require state? flag is selected for the country. If you enter a state, it is validated against the State table (accessible through the Work with Countries menu option; see Setting Up the Country Table (WCTY)) even if state is not required for the country. If state is required for the country, the system validates that the state you enter is assigned to the SCF for the postal code. Alphanumeric, 2 positions; required or optional based on country.
Country	The code for the customer's country. Country codes are defined in and validated against the Country table. Alphanumeric, 3 positions; required.
Delivery code	Identifies a business (commercial) or residential address and is used to calculate shipping charges by carriers who use different rate tables when shipping to homes and businesses, such as UPS. Valid values: • *Business* = Business rate table determines shipping charges. • *Residential* = Residential rate table determines shipping charges. • *No Distinction* = No distinction between business and residence. Only *Business* and *Residential* are valid values for U.P.S. The system defines the shipper on an order as U.P.S. if the Type field in the Ship Via table = *U*; see Working with Ship Via Codes (WVIA). Optional.

Field	Description
PO box	Identifies the address as a post office box. If the address is a post office box, you must use Parcel Post to ship the orders. Valid values are: • *selected* = this is a post office box address • *unselected* = this is not a post office box address
Language code	The language code, if any, specified for the bill-to customer. Defined in and validated against the Language table; see *Working with Language Codes (WLAN)*, Informational only.
Fax	Indicates whether you can fax this customer. Valid values are: • *unselected* = Do not fax this customer. • *selected* = Fax this customer. This field is not currently implemented.
EDI	This field is not currently implemented.
Currency code	The currency code, if any, specified for the bill-to customer. Defined in and validated against the Currency Code table; see *Working with Currency (WCUR)*. Informational only. Alphanumeric, 3 positions; optional.
Email address	The email address where the system sends purchase orders. See *Purchase Order Emails* for more information. See *Email Address Validation* for information on how the system verifies that your entry is formatted correctly. **Fraud checking:** An order associated with this bill-to customer (or whose sold-to customer is assigned to this bill-to customer) goes on *EB* hold if this email address matches an email address in the Miscellaneous Fraud table; see Working with Miscellaneous Frauds (WMFF). Alphanumeric, 50 positions; optional.

Field	Description
OptIn	Indicates the preferred method of correspondence for the bill-to email address. Not currently implemented for bill-to customers' email addresses. Valid values are: • *All Emails* = Email is the preferred method of correspondence. • *Order Emails Only* = Use email for order-related correspondence only; generate a document for other correspondence. • *No Emails* = Do not use email for any correspondence; generate a document instead. • *Do Not Ask* = Do not ask the customer for his/her email address; the customer has already been asked and has declined to provide it. The system does not generate any email correspondence to the customer, even if an email address is specified. Defaults from the *Default Opt In/Opt Out Flag (G97)* system control value, but you can override it. **Note:** The above value uses the letter O, not the number 0 (zero). Required.
Phone # (Day, Eve, Fax or Mobile)	The bill-to customer's day, evening and fax numbers. • You can also work with the bill-to customer's phone numbers at the *Work with Bill To Phone Numbers Screen*. • The *Third Phone Number Type (L53)* system control value determines whether the third phone number is labeled the Fax or Mobile number. • You can define a telephone number format to map to the phone numbers operators enter into the system. Telephone number formats are defined by arranging numbers and special characters such as hyphens and parenthesis in the same order and position as the numbers in a phone number would display. When an operator enters a phone number, the system compares the number of numeric characters in the phone number with the telephone number formats you have defined. In order to match a format, the phone number must have the same number of numeric positions as a telephone number format. If the system cannot find a match, the phone number does not map to a telephone number format and displays as it was entered by the operator.

Field	Description
	Telephone Number Format Examples An operator enters a phone number containing 10 numbers: 5085550100 The telephone number format used in the United States to represent an area code, local exchange and local phone number is: (508) 555-0100 When an operator enters a phone number containing 10 numbers (as in the example), the phone number displays so that the first 3 positions are in parenthesis and a hyphen is between the sixth and seventh numbers, regardless of how the operator entered it into the system. If an operator enters a phone number containing 6 numbers, for example 5550100 and no format exists for 6 numbers, the phone number would display as it was entered (5550100). See *Work with Telephone Number Format Screen*. Alphanumeric, one 14-position field (phone number) and one 4-position field (phone extension); optional.

Display Duplicate Bill To Window

This window displays if you try to create a bill to customer whose name and address matches an existing bill to customer on the system. The system determines this by assembling a match code for each bill to customer address on the system. A match code is made up of parts of the customer's name, address, and postal code. The match is a user-defined code defined in the Match Code table.

This window displays the new bill to customer's name and address and the matching bill to customer(s) on the system. You can:

- Select *Display* for the matching bill to customer to review additional name and address information to determine whether you should use the exiting bill to customer or create a new bill to customer.
- Select an existing bill to customer and select *Select Exist* to select an existing bill to customer instead of creating a new bill to customer.
- Select *Accept Dup* to create the new bill to customer.

Change Bill-to Customer Screen

To change: At the Work with Bill To Customers Screen, select *Change* for a bill-to customer to advance to this screen. If you change any of the information that the system extracts for the match code, the system updates the match code also. See Create Bill-to Customer Screen for remaining field descriptions.

Customer Workflow Management window: The *Customer Workflow Management Window* automatically displays when you select *Change* for a customer if open or in use ticklers exist for the bill to customer. Select *Ticklers* at this window to advance to the *Work with Ticklers Screen (bill-to customer view)* where you can review and work with ticklers associated with the bill to customer.

Work with Bill To Phone Numbers Screen

Purpose: Use this screen to review or work with phone numbers for a bill-to account.

How to display this screen: Select *Phone #s* for a customer at the Work with Bill To Customers Screen.

For more information: See *Work with Ship To Phone Numbers Screen* and *Work with Bill To Customers Screen* for field descriptions.

Screen Option	Procedure
Create a new phone number	Select *Create* to advance to the *Create Bill To Phone Number Screen*.
Change a phone number	Select *Change* for a phone number to advance to the Change Bill To Phone Numbers screen. See *Work with Bill To Customers Screen* and *Work with Ship To Phone Numbers Screen* for field descriptions.
Delete a phone number	Select *Delete* for a phone number to delete it.

Create Bill To Phone Number Screen

Purpose: Use this screen to create a phone number for a bill-to account. **How to display this screen:** Select *Create* at the Work with Bill To Phone Numbers Screen.

About this screen: See *Work with Bill To Customers Screen* and *Work with Ship To Phone Numbers Screen* for field descriptions.

Work with Bill To Notes Screen

Purpose: Use this screen to enter or review notes about the customer's billing account.

How to display this screen:

- Select *Notes* for a customer billing account at the *Work with Bill To Customers Screen*.
- Select *Notes* at the *Change Bill-to Customer Screen* or *Work with Bill To Phone Numbers Screen*.

If you *Use Workflow Management (H96)*:

- select *Notes* for a tickler whose Note type is *B* (bill to notes) at the *Work with Tickler Screen (user/group view)* or *Workflow Management Screen*.
- select *OK* at the *Create Tickler Screen*.
- select *Notes* at the *Change Tickler Screen* or Display Tickler Screen.

Field	Description
Notes	Fields where you can view, enter, or delete customer messages. If you need more space, select *Next* to display additional entry fields. Alphanumeric, 60 positions per line.
Date	The date when the note was entered. Numeric, 6 positions (in user date format); display-only, updated by the system.

Screen Option	Procedure
Enter a new note	Enter your message in the first Note field and continue until you are done, pressing *Tab* to advance to the next line if necessary.
Change an existing note	Select *Add/Change* to switch to CHANGE mode. The previously entered note fields will be enterable; you can type over them as necessary.
Switch back to ADD mode	Select *Add/Change*.

Work with Ticklers Screen (bill-to customer view)

Purpose: Use this screen to review, work with, and resolve ticklers associated with the bill-to customer.

Secured feature: If you do not have authority to the *Update All Ticklers (B09)* secured feature, you cannot update a tickler that is not assigned to you or your tickler groups or an error message indicates: `Not authorized to change`.

This secured feature controls updating a tickler by:

- selecting *Change* for a tickler to change it.
- selecting *Delete* for a tickler to delete it.
- selecting *In process* for a tickler to assign the tickler to yourself.
- selecting *Resolve* for a tickler to resolve it.

If you do not have access to this feature, you can update only ticklers assigned to you or your tickler groups. However, you can still release an order associated with the tickler from hold.

See *Workflow Management Overview and Setup* for an overview and required setup for workflow management processing.

How to display this screen:

- select *Tickers* for a bill to customer at the *Work with Bill To Customers Screen*.
- select *Ticklers* at the *Customer Workflow Management Window* (which displays when you advance to the *Change Bill-to Customer Screen* screen).

Field	Description
Bill to	The number and description of the bill to customer associated with the ticklers on the screen. Bill to number: Numeric, 9 positions; display-only. Bill to description: Alphanumeric, 40 positions; display-only.
S (tickler status)	The status of the tickler. Valid values: • *Open* = Open; the tickler is open and is available to work on in the assigned tickler work queue. • *In Process* = In process; the tickler is currently being worked on by the assigned user. • *Resolved* = Resolved; the tickler has been resolved. Optional.

Field	Description
P (tickler priority)	The priority of the tickler, indicating how important the issue associated with the tickler is to resolve (1 is the lowest priority and 9 is the highest priority). Numeric, 1 position; optional.
Assigned (assign date)	The date the tickler was assigned to the user or tickler user group. Numeric, 7 positions (in user date format); optional.
Ev (tickler event code)	The code for the tickler event that created the tickler. Valid values: • *BO* = Backorders • *CO* = Cancelled orders • *HO* = Held orders • *MN* = Manually created • *NO* = New orders • *OO* = Aged open orders • *SO* = Sold out orders • *UP* = Unconfirmed pick tickets • *VP* = Voided pick tickets • *WF* = Remote workflow See *System Delivered Tickler Events*. Alphanumeric, 2 positions; optional.
Cat (tickler category)	The tickler category assigned to the tickler. Tickler categories are defined in and validated against the Tickler Category table; see *Working with Tickler Category (WTCT)*. Alphanumeric, 3 positions; optional.
Tickler#	The tickler number assigned to the tickler, from the *Tickler Number* number assignment record. Numeric, 9 positions; optional.
User group	The group ID code of the tickler user group assigned to the tickler. Tickler user groups are defined in and validated against the Tickler User Group table; see *Working with Tickler User Groups (WTUG)*. Tickler group ID: Alphanumeric, 10 positions; display-only.
User	The user ID of the user assigned to the tickler. Users are defined in and validated against the User table; see *Working with User Records (WUSR)*. Alphanumeric, 10 positions; display-only.

Field	Description
Sts (Status)	The status of the order associated with the tickler. Valid values: • blank = Open. • *A* = Archived to optical disk. This option is not currently implemented. • *C* = Cancelled. • *H* = Held. **Note:** The system highlights the held status in a different color (for example fuchsia) if the sold to customer is a new customer, based on purchase history. A new customer has placed an order, but no orders have shipped (# orders LTD is equal to or greater than 1 and # sales LTD is equal to 0 in the Customer Sold To Order History table). • *P* = Purged. • *S* = Suspended. • *X* = Closed. Alphanumeric, 1 position; display-only.
Order#	The order associated with the tickler. Numeric, 9 positions; display-only.
Sold to	The sold to customer associated with the tickler. Numeric, 9 positions; display-only.

Screen Option	Procedure
Change a tickler	Select *Change* for a tickler to advance to the *Change Tickler Screen*.
Delete a tickler	Select *Delete* for a tickler to delete it. You can only delete *MN* (manually created) ticklers.
Display a tickler	Select *Display* for a tickler to advance to the Display Tickler Screen. See the *Change Tickler Screen* for field descriptions.
Release the order associated with the tickler from hold	Select *Release* for a tickler to advance to the *Release Reason Prompt Pop-Up Window* (order header hold), *Release Recipient Hold Reason Pop-Up Window* (recipient hold), and/or *Release Order Payment Method Window* (pay type hold). If you release an order from hold for an *HO* (held order) tickler, the system automatically resolves the tickler. Also, the system evaluates any other ticklers associated with the order to determine if they can be resolved.

Screen Option	Procedure
	If you select *Release* for a tickler not associated with a held order, an error message indicates: `Order not on hold`. If you select *Release* for a tickler not associated with an order, an error message indicates: `Tickler not eligible for this option`. **Note:** You must have authority to the Release Held Orders (ERHO) menu option to release the order from hold.
Select a tickler to work on	Select *In process* for a tickler to change the status of the tickler from open to in process. You can only select to work with a tickler that is in an open status; if you select *In process* for a tickler that is in an in process or resolved status, an error message indicates: `Tickler status cannot be changed - resolved or already in process`. Selecting this option automatically assigns the tickler to the user and creates a tickler history record.
Enter or review tickler work notes	Select *Notes* for a tickler to advance to the work notes screen, based on the note type defined for the tickler. Note type *A* advances you to the *Edit Customer Actions Window*. Note type *B* advances you to the *Work with Bill To Notes Screen*. Note type *O* advances you to the *Work with Order Messages Screen*. Note type *S* advances you to the *Edit Customer Notes Screen*. Note type *T* advances you to the *Work with Tickler Notes Screen*.
Review the tickler source	Select *Detail* for a tickler to advance to the source screen, based on the tickler event associated with the tickler. *BO*, *CO*, *HO*, *NO*, *OO*, *SO*, *UP*, *VP*, and *WF* ticklers advance you to the *Order Inquiry Header Screen*. You cannot view the source for *MN* ticklers: `Requested tickler has no source reference`.
Review tickler history	Select *History* for a tickler to advance to the *Work with Tickler History Screen*.
Resolve a tickler	Select *Resolve* for a tickler to advance to the *Resolve Tickler Window*.

Screen Option	Procedure
Review procedures for a tickler	Select *Procedure* for a tickler to advance to the *Work with Tickler Event Rule Procedure Screen*. You cannot add or change tickler procedures when you advance from the Work with Tickler screen. You cannot review procedures for *MN* ticklers.
Create a tickler for the *MN* (manually created) tickler event	Select *Create* to advance to the *Create Tickler Screen*. **Note:** To create a *MN* tickler, you must have authority to the *Create Manual Tickler (B13)* secured feature.
Review the number of ticklers in the work queue, based on the selection criteria you have defined	Select *Count* to advance to the *Current Tickler Count Window* window.
Toggle between displaying open and in use ticklers or resolved ticklers	Select *Open/Resolved*. The system toggles between displaying: • ticklers in an open or in process status. • tickler in a resolved status.

Printing the Customer Exposure Report (PCER)

Purpose: The Customer Exposure Report tells you the numbers of customer action notes entered in your company within a given date range, sorted by the reason for the note or the person who entered it. The report includes totals for each reason code, including the quantity of notes entered, in process, resolved, and remaining.

A customer action note is a message about a customer issue or problem that you need to resolve. You can enter or resolve customer action notes in:

- order entry, standard order inquiry, or order maintenance by selecting *Options* to advance to the *Display More Options Screen* and selecting Customer Action Notes (you can also use this option in quote entry, inquiry, or maintenance)
- Work with Customers by selecting *Customer Actions* or selecting *Customer Actions* for a customer at a selection screen; see *Selecting Customers* or *Creating and Updating Sold-to Customers (WCST)*

Pop-up window: Until the note is resolved, a window will pop up in quote entry/maintenance or order entry/maintenance when you select a quote or order to remind you of the open issue. The window will also pop up in Work with Return Authorizations if the Display Customer Action Notes/Messages in RA (F64) system control value is *selected*.

You can assign customer action reason codes to action notes to help you track common issues your customers raise.

Menu option: You can also work with customer action issues through *Work with Email by Order Number Screen*.

In this topic:

- *Customer Exposure Report Selection Screen*
- *Customer Exposure Report by Reason Code*
- *Customer Exposure Report by User*

For more information: See *Working with Customer Action Reason Codes (WCAR)*.

Customer Exposure Report Selection Screen

How to display this screen: Enter *PCER* in the Fast path field at the top of any menu or select Customer Exposure Report from a menu.

Field	Description
Date from	The beginning date for including notes on the report. The current date defaults. Numeric, 6 positions (in user date format); required.
Date to	The ending date for including notes on the report. The current date defaults. Numeric, 6 positions (in user date format);required.
Sort by fields:	
Customer exposure by reason code	*Select* this field to print the *Customer Exposure Report by Reason Code*.
Customer exposure by user	*Select* this field to print the *Customer Exposure Report by User*.

Instructions:

1. Optionally, enter a different beginning or end date in the Date from or Date to fields.
2. *Select* the Customer exposure by reason code field to produce the *Customer Exposure Report by Reason Code*. *Select* the Customer exposure by user field to produce the *Customer Exposure Report by User*.
3. Select *OK*. The system validates your entries and highlights any fields you need to correct. Correct any fields and select *OK* again.
4. Select *Accept*. The system submits the job *CUSTEXRPT1* to print the *Customer Exposure Report by Reason Code* or the *CUSTEXRPT2* job to print the *Customer Exposure Report by User*.

Printing the Customer Detail Exposure Report (PCAR)

Purpose: The *Customer Detail Exposure Report by Reason Code* gives you a description of the customer for whom the action note was entered within a given date range, sorted by the reason code and status of the action note. The report includes information about the customer, including the customer's address and phone numbers.

A customer action note is a message about a customer issue or problem that you need to resolve. You can enter or resolve customer action notes in order entry, inquiry, or maintenance, quote entry, inquiry, or maintenance, or through Work with Customers. Until the note is resolved, a window will pop up in order entry and quote entry to remind you of the open issue.

You can assign customer action reason codes to action notes to help you track common issues your customers raise.

> **Note:**
>
> If there are multiple customer action notes for a customer, the report lists just the first note.

For more information: See *Working with Customer Action Reason Codes (WCAR)*, and *Work with Email by Order Number Screen*.

Print Customer Detail Exposure Report Screen

How to display this screen: Enter *PCAR* in the Fast path field at the top of any menu or select Customer Detail Exposure Report from a menu.

Field	Description
Date from	The beginning date for including notes on the *Customer Detail Exposure Report by Reason Code*. The current date defaults. Numeric, 6 positions (in user date format); required.
To (Date to)	The ending date for including notes on the report. The current date defaults. Numeric, 6 positions (in user date format); required.
Reason code	The reason behind the customer action note. You can type in a specific code for this report or leave the field blank in order to view all the reason codes that have been entered for notes with the date range you have selected. Alphanumeric, 2 positions; optional.
Status to include	The status of the customer action issue. Valid status codes are: • *Open* • *Resolved* • *Work in Process* • blank = select all issues regardless of status Required.

Instructions:

1. Optionally, enter a different beginning or end date in the Date from or Date to fields.
2. Enter a valid reason code in the Reason code field or leave this field blank to print all valid reason codes.
3. Enter a valid status code in the Status to include field or leave this field blank to include all action notes.
4. Select *OK*. The system validates your entries and highlights any fields you need to correct. Correct any fields and select *OK* again.
5. Select *Accept*. The submitted job generates the *Customer Detail Exposure Report by Reason Code*.

Working with Customer API (WCAI)

Purpose: Use this menu option to review, work with, delete, or resubmit customer API requests that are in error.

The *CWCustomer or CWMessageIn Web Service* receives and processes the *Inbound Customer Message (CWCustomerIn)* and creates or updates a customer, based on the information in the inbound message. If the request is in error for any reason, the system saves the information from the request in the Customer API Work table. If the request also includes email or user-defined field information, this additional information is stored in the Customer API E-mail Work table and the Customer API UDF Work table.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Error reasons: See *Error Checking for Add Requests*.

For more information: See *Generic Customer API*, including *Adding a Customer using the Customer API*, *Changing a Customer using the Customer API*, and the *Inbound Customer Message (CWCustomerIn)*.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

In this topic:

- *Work with Customer API Screen*
- *Change Customer API Screen*
- *Work with Customer API User Field Screen*
- *Change Customer API User Field Screen*
- *Work with Customer API Email Screen*
- *Change Customer API Email Screen*

Work with Customer API Screen

How to display this screen: Enter *WCAI* in the Fast path field at the top of any menu, or select Work with Customer API from a menu.

Field	Description
Date	The date when the Customer API Work table record was created. Numeric, 6 positions (in user date format); optional.
Time	The time when the Customer API Work table record was created. Numeric, 6 positions (HHMMSS format); optional.
Act (Action)	The requested action from the *cst_action_type* in the *Inbound Customer Message (CWCustomerIn)*. If the cst_action_type is *D*, the system places the message in error with the error reason `Invalid Action Type`. The system ignores any other value; see *Determining Whether to Add or Change a Customer* for more information on the logic the system uses to determine whether to create a new customer or change an existing one. Display-only. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Field	Description
Status	The status of the request. *E* (error) = The Customer request is in error. blank = The Customer request is ready to reprocess. Alphanumeric, 1 position; display-only.
Customer#	The customer number affected by the request. • If an Add request is in error, the customer number displayed here does not yet exist in the Customer Sold To table. • If a Change request is in error because the customer could not be identified, the customer number displayed here is zero. Numeric, 9 positions; display-only.
Alternate#	The *cst_interface_cust_nbr*, if any, specified in the *Inbound Customer Message (CWCustomerIn)*. No alternate customer number is displayed if the *Assign Alternate Customer # (I88)* system control value is *selected*; in this situation, the system assigns the alternate customer number when it actually creates the customer. Alphanumeric, 15 positions; display-only. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Rsn	Not currently implemented. Select *Change* for the customer API record to advance to the *Change Customer API Screen*; when you select *OK* on this screen, the system displays a message indicating the reason why the Customer API record is in error. Alphanumeric, 1 position; display-only.

Option	Procedure
Change a customer API request record	Select *Change* for a customer API request record to advance to the *Change Customer API Screen*.
Delete a customer API request record.	Select *Delete* for a customer API request record to delete it.
Work with user-defined fields for a customer API request record	Select *User defined fields* for a customer API request record to advance to the *Work with Customer API User Field Screen*.
Work with email information for a customer API request record	Select *Email* for a customer API request record to advance to the *Work with Customer API Email Screen*.
Reprocess a customer API request record	Select *Reprocess* for a customer API request record to submit it for processing. The system reprocesses the record only if it is error-free. See *Adding a Customer using the Customer API* for more information. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Reprocess all customer API requests	Select *Reprocess* to submit all eligible request records for processing. See *Adding a Customer using the Customer API* for more information. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Change Customer API Screen

Purpose: Use this screen to work with customer API requests that are in error based on the information passed in the *CustSoldTo* element of the *Inbound Customer Message (CWCustomerIn)*.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

How to display this screen: Select *Change* for a customer API record in error.

Field	Description
Date	The date when the Customer API Work table record was created. Numeric, 6 positions (in user date format); display-only.
Action	The requested action from the *cst_action_type* in the *Inbound Customer Message (CWCustomerIn)*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Possible actions are: • *Add* = Add a customer • *Change* = Change an existing customer • *Delete* = Delete an existing customer **Note:** You can only create or update a customer; the system does not allow you to delete a customer through the *Generic Customer API*. See *Determining Whether to Add or Change a Customer* or the logic the system uses to determine whether to create a new customer or change an existing one. Display-only. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Entered on	The *cst_entry_date* from the *Inbound Customer Message (CWCustomerIn)*. Numeric, 6 positions (in user date format); optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Lng (Language)	The *cst_language* from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 3 positions; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Field	Description
Class	The *cst_cust_class* from the *Inbound Customer Message (CWCustomerIn)*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Alphanumeric, 2 positions; optional (required if the *Require Customer Class in OE, WCAT, and WCST (H85)* system control value is *selected*).
Time	The time when the Customer API Work table record was created. Numeric, 6 positions (HHMMSS format); display-only.
Status	The status of the customer API request. Possible statuses are: • *Error* = The Customer request is in error. • *No Error* = The Customer request is ready to reprocess. Display-only.
Created by	The *cst_create_user* from the *Inbound Customer Message (CWCustomerIn)*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). **Note:** Regardless of the user you select for this field, the system defaults the user ID of the user updating the Customer API record. Alphanumeric, 10 positions; optional.
Cur (Currency)	The *cst_currency* from the *Inbound Customer Message (CWCustomerIn)*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Alphanumeric, 3 positions; optional.
Comp Cd (Company code)	The *cst_cust_company* from the *Inbound Customer Message (CWCustomerIn)*. Numeric, 3 positions; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Customer#	The *cst_cust_nbr* from the *Inbound Customer Message (CWCustomerIn)*, or assigned by the system if this is an Add request. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). • If an Add request is in error, the customer number displayed here does not yet exist in the Customer Sold To table. • If a Change request is in error because the customer could not be identified, the customer number displayed here is zero. Numeric, 9 positions; display-only.

Field	Description
Changed by	The *cst_change_user* from the *Inbound Customer Message (CWCustomerIn)*. **Note:** Regardless of the user you select for this field, the system defaults the user ID of the user updating the Customer API record. Alphanumeric, 10 positions; required. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Typ (Type)	The *cst_cust_type* from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 3 positions; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Mail Cd (Mail code)	The *cst_mail_code* from the *Inbound Customer Message (CWCustomerIn)* Not to be confused with the Mail flag. Alphanumeric, 3 positions; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Account#	The *cst_account_nbr* from the *Inbound Customer Message (CWCustomerIn)*. Numeric, 7 positions; optional.
Commer (Commercial)	The *Inbound Customer Message (CWCustomerIn)* flag from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 1 position; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Alt# (Alternate customer #)	The *cst_interface_cust_nbr cst_interface_cust_nbr* from the *Inbound Customer Message (CWCustomerIn)*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). **Note:** No alternate customer number is displayed if the *Assign Alternate Customer # (I88)* system control value is *selected*; in this situation, the system assigns the alternate customer number when it actually creates the customer. Alphanumeric, 15 positions; optional.

Field	Description
Call Cd (Call code)	The *cst_call_code* from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 3 positions; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Name	The customer's name from the *Inbound Customer Message (CWCustomerIn)*, consisting of: • *cst_prefix* • *cst_fname* • *cst_minitial* • *cst_lname* • *cst_suffix* Alphanumeric, 47 positions; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Inact (Inactive)	The *cst_inactive* flag from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 1 position; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Company	The *cst_company_name* from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 30 positions; required if no last name is specified. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Apt	The *cst_apt* from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 7 positions; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
PO Box	The *cust_po_box* flag from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 1 position; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Suppr Sls Email (Suppress salesman email)	The *cst_suppress_sales_rep_email* from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 1 position; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Street	The *cst_street_addr* from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 32 positions; required. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Field	Description
Delivery code	The *cst_delivery_type* from the *Inbound Customer Message (CWCustomerIn)*. Valid values: • *Business* • *Residential* • *No Distinction* Required. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Mail	The *cst_mail_name* flag from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 1 position; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Address	The *cst_addr_line_2*, *cst_addr_line_3*, and *cst_addr_line_4* from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 32 positions each; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Deliverable cde (Deliverable code)	The *cst_deliverable* flag from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 1 position; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Rent	The *cst_rent_name* flag from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 1 position; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Orig mail type (Original mail type)	The *cst_orig_mail_type* from the *Inbound Customer Message (CWCustomerIn)*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Valid values: • *Buyer* • *Catalog Request* • *Recipient* • *Rental* • *Suspect/Prospect* Optional.
Seed	The *cst_seed_name* flag from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 1 position; optional.

Field	Description
Curr mail type (Current mail type)	The *cst_curr_mail_type* from the *Inbound Customer Message (CWCustomerIn)*. Valid values: • *Buyer* • *Catalog Request* • *Recipient* • *Rental* • *Suspect/Prospect* Optional.
H/B/F	The *cst_hold_bypass_ fraud* flag from the *Inbound Customer Message (CWCustomerIn)*. Valid values: • *Hold* • *Bypass* • *Fraud* Optional.
Postal code	The *cst_orig_mail_type* from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 10 positions; required. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
City	The *cst_city* from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 25 positions; required. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
State	The *cst_state* from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 10 positions; required if specified for country. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Country	The *cst_country* from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 3 positions; required. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Job title	The *cst_job_title* flag from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 10 positions; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Exempt status	The *cst_tax_exempt* flag from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 1 positions optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Field	Description
Cert# (Certificate number)	The *cst_exempt_ certificate* from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 30 positions; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Day phone	The *cst_day_phone* and *cst_day_ext* from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 14 positions (phone number) and 4 positions (extension); optional.
Expiry date	The *cst_exempt_expiry* from the *Inbound Customer Message (CWCustomerIn)*. Labeled the *Second Create Customer Sold To Screen*. Numeric, 8 positions; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
VAT	The *cst_vat_nbr* from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 20 positions; optional.
Eve phone (Evening phone)	The *cst_eve_phone* and *cst_eve_ext* from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 14 positions (phone number) and 4 positions (extension); optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Orig source (Original source)	The *cst_original_source* from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 9 positions; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Email sts (Email status)	The *cst_email_status* from the *Inbound Customer Message (CWCustomerIn)*. The value specified in the *Default Opt In/Opt Out Flag (G97)* system control value defaults here if no status was specified in the inbound message. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). **Note:** The system displays an error message at this screen if the email status is missing or invalid for the email address specified for the Add or Change request. See *Work with Customer API Email Screen*. Alphanumeric, 2 positions; optional.
Assoc (Associate)	The *cst_associate* flag from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 1 position; optional.

Field	Description
Fax	The *cst_fax_phone* and *cst_fax_ext* from the *Inbound Customer Message (CWCustomerIn)*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). **Note:** The *Third Phone Number Type (L53)* system control value determines whether the third phone number is labeled the Fax or Mobile number here, and on reports and other screens. Alphanumeric, 14 positions (phone number) and 4 positions (extension); optional.
Curr source (Current source)	The *cst_current_source* from the *Inbound Customer Message (CWCustomerIn)*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Alphanumeric, 9 positions; optional.
Rent email	The *cst_rent_email* flag from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 1 position; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Can BO (Cancel backorder)	The *cst_cancel_bo* flag from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 1 position; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Byp rsv (Bypass reservation)	The *cst_bypass_reservation* flag from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 1 position; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Discount%	The *cst_discount_pct* from the *Inbound Customer Message (CWCustomerIn)*. Numeric, 5 positions with a 2-place decimal; optional.
Sls # (Salesrep #)	The *cst_salesman_nbr* from the *Inbound Customer Message (CWCustomerIn)*. Numeric, 7 positions; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Do not fax	The *cst_do_not_fax* flag from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 1 position; optional.

Field	Description
Col (Column)	The *cst_price_column* from the *Inbound Customer Message (CWCustomerIn)*. Numeric, 2 positions; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Item track	The *cst_item_hist_ tracking* flag from the *Inbound Customer Message (CWCustomerIn)*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Valid values: • *No Item Tracking* • *Sold To Tracking Only* • *Sold To + Ship To Tracking* Optional.
User 1-4	The *cst_user_field_1*, *cst_user_field_2*, *cst_user_field_3*, and *cst_user_field_4* from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 10 positions each; optional.
Relate Id	The *cst_relate_id* from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 32 positions; display-only. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Pop up 1-2	The *cst_pop_window_1* and *cst_pop_window_2* from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 20 positions each; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Reserve Warehouse	The *cst_reserve_warehouse* from the *Inbound Customer Message (CWCustomerIn)*.The warehouse must be an allocatable warehouse (the Allocatable flag for the warehouse is *selected*). Warehouse codes are defined in and validated against the Warehouse table. See *Creating and Maintaining Warehouses (WWHS)*. Numeric, 3 positions; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Pop up 3-4	The *cst_pop_window_3* and *cst_pop_window_4* from the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 20 positions each; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Completing this screen: Complete or correct each required field. See *Inbound Customer Message (CWCustomerIn)* for more information on how each field is derived and validated.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Note:

- The system displays an error message at this screen if there is an error with the Customer API UDF Work table or the Customer API E-mail Work table. See below for more information on how to advance to the correct screens to correct these errors.
- The system displays the Display Duplicate Sold To window if the customer information in an Add request matches an existing customer. See *Adding a Customer using the Customer API* for more information.
- For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Option	Procedure
Work with user-defined fields for the customer API request	Select *User fields* to advance to the *Work with Customer API User Field Screen*.
Work with email addresses for the customer API request	Select *Email* to advance to the *Work with Customer API Email Screen*.

Work with Customer API User Field Screen

Purpose: Use this screen to review or work with customer user-defined field information passed in the *CustUserDefinedField* element of the *Inbound Customer Message (CWCustomerIn)*.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

How to display this screen: Select *User defined fields* for a record at the *Work with Customer API Screen*, or select *User fields* at the *Change Customer API Screen*.

Field	Description
Customer	The *cst_cust_nbr* from the *Inbound Customer Message (CWCustomerIn)*, or assigned by the system if this is an Add request. The name of the customer is displayed to the right. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Number: numeric, 9 positions; display-only. Name: alphanumeric, 41 positions; display-only.
Seq	The *cst_udf_seq* from the *CustUserDefinedField* element of the *Inbound Customer Message (CWCustomerIn)*. This sequence number identifies the type of user-defined field required. See *Work with User Fields Screen* for more information. Numeric, 9 positions; display-only. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Text	The *cst_udf_text* from the *CustUserDefinedField* element of the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 30 positions; display-only. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Field	Description
Number	The *cst_udf_nbr* from the *CustUserDefinedField* element of the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 30 positions; display-only. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Date	The *cst_udf_date* from the *CustUserDefinedField* element of the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 30 positions; display-only. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Option	Procedure
Change user-defined field information	Select *Change* for a user-defined field to advance to the *Change Customer API User Field Screen*.
Delete user-defined field information	Select *Delete* for a user-defined field to delete it.

Change Customer API User Field Screen

Purpose: Use this screen to review or change the user-defined field information in a customer API Add or Change request.

Correcting user-defined field information: The user-defined field information passed in the *Inbound Customer Message (CWCustomerIn)* must match the type (text, number, or date) based on the sequence number for the user-defined field detail, or the customer API Add or Change request will be in error. Each customer API user field record must include one of these types of data. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).*Work with User Fields Screen* for more information.

How to display this screen: Select *Change* for a record at the *Work with Customer API User Field Screen*.

Field	Description
Customer	The *cst_cust_nbr* from the *Inbound Customer Message (CWCustomerIn)*, or assigned by the system if this is an Add request. The name of the customer is displayed to the right. Number: numeric, 9 positions; display-only. Name: alphanumeric, 41 positions; display-only. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
	Just one of the following fields must be completed. The type of field must match the sequence number for the user-defined field detail. See *Work with User Fields Screen* for more information.

Field	Description
Text	The *cst_udf_text* from the *CustUserDefinedField* element of the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 30 positions; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Number	The *cst_udf_nbr* from the *CustUserDefinedField* element of the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 30 positions; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Date	The *cst_udf_date* from the *CustUserDefinedField* element of the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 30 positions; optional. v

Work with Customer API Email Screen

Purpose: Use this screen to review the email addresses included in the *CustEmail* element of the *Inbound Customer Message (CWCustomerIn)*, or to select an email address for review or update.

How to display this screen: Select *Email* for an Add or Change request at the *Work with Customer API Screen* or select *Email* at the *Change Customer API Screen*.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Field	Description
Customer	The *cst_cust_nbr* from the v, or assigned by the system if this is an Add request. The name of the customer is displayed to the right. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Number: numeric, 9 positions; display-only. Name: alphanumeric, 41 positions; display-only.
Email address	The *cst_email_address* from the *CustEmail* element of the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 50 positions; display-only. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Status	The *cst_email_status* from the *CustEmail* element of the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 2 positions; display-only. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Fmt (Format)	The *cst_email_format* from the *CustEmail* element of the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 1 position; display-only. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Field	Description
Prm (Primary)	The *cst_email_primary* flag from the *CustEmail* element of the *Inbound Customer Message (CWCustomerIn)*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Alphanumeric, 1 position; display-only.

Option	Procedure
Change an email address in an Add or Change request	Select *Change* for an email address to advance to the *Change Customer API Email Screen*.
Delete an email address in an Add or Change request	Select *Delete* for an email address to delete the email address from the Add or Change request.

Change Customer API Email Screen

Purpose: Use this screen to review or change the email address information included in a customer API Add or Change request.

How to display this screen: Select *Change* for an email address at the *Work with Customer API Email Screen*.

Field	Description
Customer	The *cst_cust_nbr* from the *Inbound Customer Message (CWCustomerIn)*, or assigned by the system if this is an Add request. The name of the customer is displayed to the right. Number: numeric, 9 positions; display-only. Name: alphanumeric, 41 positions; display-only. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Email address	The *cst_email_address* from the *CustEmail* element of the *Inbound Customer Message (CWCustomerIn)*. Subject to the email address format edits described under *Email Address Validation*. Alphanumeric, 50 positions; required. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Email status	The *cst_email_status* from the *CustEmail* element of the *Inbound Customer Message (CWCustomerIn)*. If no status is specified here, the *cst_email_status* from the *CustSoldTo* element defaults; and if no status is specified there, then the value from the *Default Opt In/Opt Out Flag (G97)* system control value defaults to both. Alphanumeric, 2 positions; required. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Email format	The *cst_email_format* from the *CustEmail* element of the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 1 position; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Field	Description
Display name	The *cst_display_name* from the *CustEmail* element of the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 50 positions; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Primary	The *cst_email_primary* flag from the *CustEmail* element of the *Inbound Customer Message (CWCustomerIn)*. Alphanumeric, 1 position; optional. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Order Inquiry

In this part: Order inquiry spans the breadth of the system's functions, giving you access to customer, order, line, and item summary and detail information. This part presents the screens you use to review this information.

- *Using the Order Inquiry Scan Screens (OIOM)* shows you how to find an order based on the information available to you.
- *Reviewing the Order Inquiry Header Screen* presents the Order Inquiry screen, which contains information about the customer, such as name, address, phone number and source code.
- *Reviewing Order Inquiry Detail Information* presents the Order Inquiry screen containing information on the items the customer has ordered.
- *Reviewing Order Details* presents the screens you use to review detail related to a specific item on an order.
- *Options Available in Order Inquiry* presents a table of the functions available from the Order Inquiry Header or Detail screens, and refers you to topics containing more information on the use of these functions.
- *Reviewing Financial Information on an Order* presents screens that display information pertaining to charges and credits, such as invoices, refunds, and order totals. The topic also includes a discussion of order payment methods.
- *Reviewing Order-Level Properties* explains how to review order properties.
- *Display Order Line History Screen* explains how to review all activity performed on a particular item on an order.
- *Display Order History Screen* explains how to review all activity performed on an entire order.
- *Display Package Information Screen* describes the screen that lists all tracking numbers associated with shipments for the order and provides live links to shipment tracking pages when available.
- *Streamlined Order Inquiry (DORI)* describes a consolidated order inquiry option with simplified search options.
- *Customer Engagement Purchase History Integration* presents the Display Purchase History screen, which contains a customer’s completed sales and return transactions

across multiple channels, such as retail, call center, and e-commerce. This purchase history information is from Oracle Retail Customer Engagement.

Order Inquiry/Maintenance (OIOM)

> **Note:**
>
> You can also review and work with orders in Modern View.

For information on:	See
Order Inquiry	
Selecting an order for inquiry; different scan options	*Using the Order Inquiry Scan Screens (OIOM)*
Reviewing **order header** information such as name, address, phone number, and source code	*Reviewing the Order Inquiry Header Screen*
Reviewing **order detail** information (items on the order)	*Reviewing Order Inquiry Detail Information*
The various **additional options** available from the order inquiry header and detail screens	*Options Available in Order Inquiry*
Reviewing **financial information** about the order, such as invoices, refunds, payment methods, and order totals	*Reviewing Financial Information on an Order*
Reviewing **order properties**	*Reviewing Order-Level Properties*
Reviewing **history for an order line**	*Display Order Line History Screen*
Reviewing **history for the order**	*Display Order History Screen*
Track package shipments	*Display Package Information Screen*
Order Maintenance	
Order maintenance **features and restrictions**	*Introducing Order Maintenance*
Selecting an order for inquiry; different scan options	*Selecting an Order for Maintenance*
Possible **updates** you can make to the **order header**, including conditions and restrictions	*Work with Order Screen in Order Maintenance*
Possible **updates** you can make to an **order detail line**, including conditions and restrictions	*Changing Item Detail Line Information in Order Maintenance*
How to **add an order detail line** to an order	*Adding an Item in Order Maintenance*
How to **increase or decrease the unit quantity** of an order detail line	*Increasing the Quantity Ordered in Order Maintenance*
How to **cancel an order detail line**	*Canceling an Item in Order Maintenance*
How to **cancel an order**	*Canceling an Order through Order Maintenance*

For information on:	See
How to **return or exchange** items through order maintenance	*Returning and Exchanging Items in Order Maintenance*
How to work with **payment methods**	*Enter Payment Methods Screen in Order Maintenance*
How to add an **additional shipping address**	*Adding a Recipient Order in Order Maintenance*

Streamlined Order Inquiry (DORI)

Purpose: Streamlined order inquiry provides a one-screen snapshot of an order for efficient order inquiry. This option includes a subset of the information available through standard order inquiry, so that you can quickly answer the most frequently asked questions about an order.

When would you use standard order inquiry? You might use standard rather than streamlined order inquiry if you need:

- additional search options (for example, search by customer number, order type, or purchase order number)
- more extensive information related to the customer, order, invoices, payment methods, and items (for example, order detail pricing methods, additional charge codes applied, customer warranty information, pick slips, customer action notes, subscriptions, price override reasons, or deferred billing information)
- the ability to advance to order maintenance and maintain or cancel the order

Standard order inquiry is the default: When you select *Order Inquiry* within another menu option, you advance to standard order inquiry.

Modern View option: You can also review and work with orders through Modern View.

In this topic:

- *First Streamlined Order Inquiry Screen (Find Order or Customer)*
- *Second Streamlined Order Inquiry Screen (Search Results)*
  - *Customer Results Fields (Select Customer from List Below)*
  - *Order Results Fields*
  - *Sort and Expand Column Options*
- *Third Streamlined Order Inquiry Screen (Order Summary)*
  - *Screen Header*
  - *Products*
  - *Customers*
  - *Properties*
  - *Payment*
  - *Invoices*
  - *Carton Contents*
  - *Refunds*

- *Pop-Up Windows*
  - *History Window*
  - *Order Messages Window*
  - *Order Detail Window*
  - *Order Detail Messages Window*
  - *Invoice Detail Window*

First Streamlined Order Inquiry Screen (Find Order or Customer)

Purpose: Use this screen to select an order for inquiry, or to search for an order based on information you know about the customer or the order.

How to display this screen: Enter *DORI* in the Fast path field at the top of any menu, or select Streamlined Order Inquiry from a menu.

Field	Description
Enter Order	
Order #	Enter a valid order number (without including the ship-to number) to advance directly to the *Third Streamlined Order Inquiry Screen (Order Summary)*, displaying information on that order. **No ship-to number:** You cannot search on the ship-to number, just the order number. For example, enter 1234 rather than 1234-1. **Multiple ship-tos?** If the order number you enter has multiple recipients, you cannot advance directly to one of these ship-tos. For example, if order 1234 has three ship-tos (1234-1, 1234-2, and 1234-3), to review the third ship-to: • Enter 1234 in the Order # field and click *Search* • Click 1234-3 in the *Order Results Fields* to advance to the *Third Streamlined Order Inquiry Screen (Order Summary)* If the order number you enter is invalid, you need to enter other search criteria in order to review the order. **Cannot combine:** You cannot use the order number together with other criteria to search. Order number: numeric, 8 positions.

Field	Description
or Find Customer	Enter information about the sold-to customer to display the *Customer Results Fields (Select Customer from List Below)* so you can identify the customer who placed the order. After you use the *Customer Results Fields (Select Customer from List Below)* to select the customer, you can then use the *Order Results Fields* to select a particular order for inquiry. *More than 100 matches?* If there are more than 100 customers that match your search criteria, the *Customer Results Fields (Select Customer from List Below)* display just the first 100. In this situation, you need to further refine your search criteria to make sure that the correct customer is included in the search results. **Note:** Ghost customers are omitted from the search results.
Postal code	Enter a full or partial postal or zip code to display customers whose postal codes begin with your entry. **Can combine:** You can use the Postal code in combination with the Last name or Company name to search for customers. **Sort order for search results:** When you search based on Postal code, the *Customer Results Fields (Select Customer from List Below)* are initially sorted in ascending order by postal code (lowest postal code first). Within a postal code, results are sorted in ascending order by customer number. Alphanumeric, 10 positions.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Last name</td><td>Enter a full or partial last name to display customers whose last names begin with your entry.

Note:
If a customer record that matches your entry also has a company name specified, the company name is listed before the last name in the search results.

Can combine: You can use the Last name in combination with the Postal code or Company name to search for customers.
Sort order for search results: When you search based on Last name, the Customer Results Fields (Select Customer from List Below) lists customers as follows:
• alphanumerically by last name
• if more than one customer has the same last name, alphanumerically by first name
• if more than one customer has the same last and first name, numerically by customer number
The screen does not use any other fields, such as middle initial or company name, when sorting customers by name.
Alphanumeric, 25 positions.</td></tr>
<tr><td>Company name</td><td>Enter a full or partial company name to display customers whose company names begin with your entry.
Can combine: You can use the Company name in combination with the Last name or Postal code to search for customers.
Sort order for search results: When you search based on Company name, the Customer Results Fields (Select Customer from List Below) are initially sorted in ascending alphabetical order by company name. If more than one customer has the same company name, results are sorted in ascending order by customer number.
Alphanumeric, 30 positions.</td></tr>
<tr><td>Phone number</td><td>Enter a full phone number to display customers with that day, evening, or third (fax or mobile) phone number.
• It is not necessary to enter the number in the country’s telephone number format.
• Searching by partial phone number is not supported.
Cannot combine: You cannot use phone number together with other criteria to search.
Sort order for search results: If more than one customer has a matching phone number, the Customer Results Fields (Select Customer from List Below) are sorted in ascending order by customer number.
Alphanumeric, 14 positions.</td></tr>
</table>

Field	Description
Email address	Enter a full or partial email address to display customers with a matching record in the Customer Sold To Email table. • The email address does not need to be the customer's primary email address. • The email address can be upper and lower case; however, searching is case-insensitive (matches regardless of case). • If a customer has multiple email addresses that match your entry, the customer is displayed only once. The *Customer Results Fields (Select Customer from List Below)* list customers matching your entry in numeric order by customer number. **Cannot combine:** You cannot use the email address together with other criteria to search. **Sort order for search results:** If more than one customer has a matching email address, the *Customer Results Fields (Select Customer from List Below)* are initially sorted in numeric order by customer number. Alphanumeric, 50 positions.
or Find Order	**Cannot combine:** You cannot combine any of the following criteria to search. **More than 100 matches?** If there are more than 100 orders that match your search criteria, the *Order Results Fields* display just the first 100. In this situation, you need to further refine your search criteria to make sure that the correct order is included in the search results.
Customer #	Enter a valid sold-to customer number to display orders placed by that customer. **Sort order for search results:** The *Order Results Fields* list orders placed by the customer in ascending order by order number (most recent first). Numeric, 9 positions.

Field	Description
Web order #	Enter a valid web order number to display orders whose E-Commerce order number in the Order Header Extended table matches your entry. In the case of a retail pickup or delivery order assigned through the Order Orchestration Integration, the web order number is the order number in the system originating the order. If the originating system is Order Administration, the system prefaces this number with the text `ORIG#:`. For example: `ORIG#: 9999-001`, where `ORIG#:` indicates the order originated in Order Administration, `9999` is the original order number in Order Administration, and `001` is the ship to number. **Important:** Searching by a partial web order number is not supported. If you wish to review a retail pickup or delivery order whose originating system is Order Administration, you must enter `ORIG#: 9999-001`, where `9999` is the order number and `001` is the ship to number. **Sort order for search results:** If there is more than one order with the specified alternate order number, the *Order Results Fields*list matching orders in reverse chronological sequence (most recent orders first). Alphanumeric, 35 positions.
Order date	Enter or select an order date to display orders matching your entry. The order date might differ from the entered date for an order if, for example, you did not create the order on the system the same day it was received, and wanted to back-date the order so it would receive appropriate priority for reservation and backorder purposes. **Sort order for search results:** The *Order Results Fields*list orders for the specified date in reverse chronological sequence (most recent orders first). Numeric, 6 positions (in user date format).
User	Select the user ID of the person or process that entered or created the order. **Sort order for search results:** The *Order Results Fields* list matching orders in reverse chronological sequence (most recent orders first).

Option	Procedure
Search for customers or orders	Use the fields described above to search for a sold-to customer or for a particular order, and click *Search* to display the *Customer Results Fields (Select Customer from List Below)* or the *Order Results Fields*.

Option	Procedure
Clear data from the screen	Select *Clear* to clear your search criteria and previous search results from the screen. **Note:** If you have removed any columns from the results as described under *Sort and Expand Column Options*, the deleted columns remain hidden when you search based on new results.

Second Streamlined Order Inquiry Screen (Search Results)

Purpose: Use this screen to review the results of your search from the *First Streamlined Order Inquiry Screen (Find Order or Customer)*. From the:

- *Customer Results Fields (Select Customer from List Below)*: Select a customer to display the *Order Results Fields*.
- *Order Results Fields*: Select an order to advance to the *Third Streamlined Order Inquiry Screen (Order Summary)*.

Field and sort options are described below:

- *Customer Results Fields (Select Customer from List Below)*
- *Order Results Fields*
- *Sort and Expand Column Options*

Maximum 100 results: Search results are limited to the first 100 matching customers or orders, based on your search criteria. For example, if your search results display orders in descending sequence by order number, only the 100 most recent orders are displayed. To see additional customers or orders, you must use different search criteria.

How to display this screen: Complete any of the fields under *or Find Customer* or *or Find Order* and click *Search*.

Customer Results Fields (Select Customer from List Below)

Customer-related search results are described below. The screen displays these results when your search was based on the criteria available under *or Find Customer*.

Select a customer: You can click a customer number to display the *Order Results Fields* for that customer, and then select an order.

Field	Description
Customer #	The number identifying a sold-to customer who matches the search criteria you entered under *or Find Customer*. Click the customer number to display the *Order Results Fields* for that customer. Numeric, 9 positions.
Name	The customer's: • company name, if any • last name • first name • middle initial, if any Company name: alphanumeric, 30 positions. Last name: alphanumeric, 25 positions. First name: alphanumeric, 15 positions. Middle initial: alphanumeric, 1 position.
Address	The first line of the customer's street address. Alphanumeric, 32 positions.
City	The customer's city. Alphanumeric, 25 positions.
State	The customer's state. Alphanumeric, 2 positions.
Postal code	The customer's postal or zip code. Alphanumeric, 10 positions.

Order Results Fields

Order-related search results are described below. The screen displays these results when your search was based on the criteria available under *or Find Order*, or when you select a customer from the *Customer Results Fields (Select Customer from List Below)*.

> **Note:**
>
> The order results fields do not display orders if the selected customer was the order recipient.

Select order: You can click an order number to advance to the *Third Streamlined Order Inquiry Screen (Order Summary)*.

If no orders displayed: You can click *Search* again without clearing your search criteria in order to re-display the same list of customers from your previous search and select a different customer.

Group option: The group option is available for the following fields. See *Sort and Expand Column Options* for more information.

Field	Description
Order #	The number identifying an order that matches the search criteria you entered under *or Find Order*. Click the order number to display the *Third Streamlined Order Inquiry Screen (Order Summary)* for that order. Numeric, 8 positions.
Status	The order status. Possible statuses are: • *Billing* = The order is currently being processed by the BILL_ASYNC job. If an order remains in this status, it could indicate an error in billing processing. See *Working with the BILL_ASYNC Job* for background. • *Canceled* = You have canceled all items on the order, either individually or collectively, using a cancel reason code that is not flagged to reduce demand. See *Establishing Cancel Reason Codes (WCNR)* for background on cancel reason codes. • *Error* = The order is currently flagged with an error and suspended in an order batch. See *Order Creation Errors* for background. • *Held* = The order is currently held. See *Introducing Order Hold Reason Codes* for background. • *Open* = There is at least one open, unshipped item on the order. • *Quote* = This is a pre-order quote. See *Entering Pre-Order Quotes* for background. • *Suspended* = The order is currently suspended in an order batch. See *Introducing Order Batches* for background. • *Closed* = The order is shipped, canceled with a cancel reason flagged to reduce demand, or partially shipped and the remainder of the lines canceled. This is also the status displayed if the Order Header status is *Purged*. **Header and Ship To status different?** If the status for the Order Header is different from the status for the Order Ship To, the Order Ship To status is displayed, unless: • If the Order Ship To is open and the Order Header is held, the held status is displayed. • If the Order Ship To is suspended and the Order Header is in error, the error status is displayed.
Date	The order date. This date might differ from the entered date if, for example, you did not create the order on the system the same day it was received, and wanted to back-date the order so it would receive appropriate priority for reservation and backorder purposes. Numeric, 6 positions; in user date format.
Customer	The sold to customer's: • company name, if any • last name • first name • middle initial Company name: alphanumeric, 30 positions. Last name: alphanumeric, 25 positions. First name: alphanumeric, 15 positions. Middle initial: alphanumeric, 1 position.

Field	Description
Recipient	The order recipient's: • company name, if any • last name • first name • middle initial The recipient can be a one-time shipping address; a permanent shipping address; a different sold-to customer; or the sold-to customer's own address. Company name: alphanumeric, 30 positions. Last name: alphanumeric, 25 positions. First name: alphanumeric, 15 positions. Middle initial: alphanumeric, 1 position.

Sort and Expand Column Options

Default sort: The initial sort of the search results is based on the search criteria you entered at the *First Streamlined Order Inquiry Screen (Find Order or Customer)*. See the field descriptions (under *or Find Customer* and *or Find Order*) for more information.

Displaying more than the first 100 results: Regardless of how you sort or group the information in the search results, the screen does not display any records that are not among the first 100 results based on your search criteria. For example, if your search criteria display orders in descending sequence by order number, only the 100 most recent orders are displayed. To see additional customers or orders, you must use different search criteria.

Options:

- *Sorting by a Column*
- *Expanding a Column*

Sorting by a Column

Click the column name to sort the displayed search results by the information in that column in either ascending or descending order.

For example, click the Order # column to sort the search results by order number.

If the search results are currently sorted in ascending order (for example, by date), the arrow points up:

If the search results are currently sorted in descending order (for example, by date), the arrow points down:

Expanding a Column

To expand a column so that you can see more information, position your cursor on the border between the column you want to expand and the column to its right until you see a double-pointed arrow; then drag the arrow to the right.

Third Streamlined Order Inquiry Screen (Order Summary)

Purpose:

- *Screen Header*
- *Products*
- *Customers*
- *Properties*
- *Payment*
- *Invoices*
- *Carton Contents*
- *Refunds*

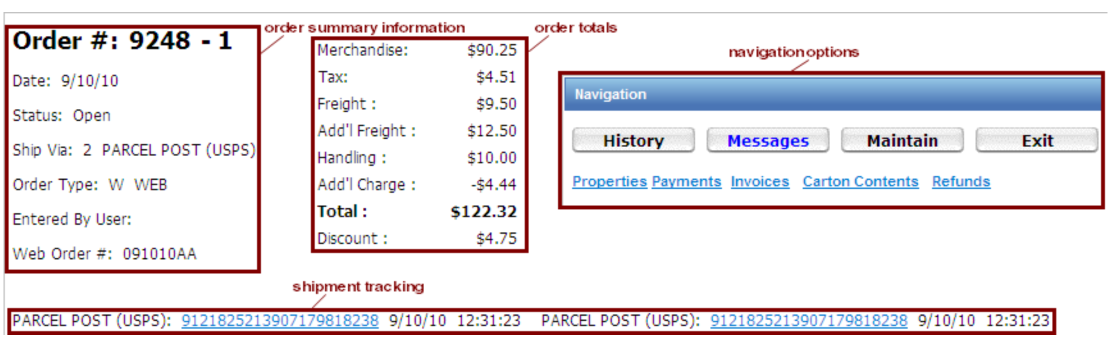
> **Note:**
>
> Depending on the user's authority to credit card information, the system may write a record to the Credit Card Audit table when this screen is displayed. See Logging Credit Card Data Access in the *Data Security Guide* on My Oracle Support (2953017.1) for more information.

How to display this screen: Select an order from the *Order Results Fields*.

Screen Header

This area of the *Third Streamlined Order Inquiry Screen (Order Summary)* screen includes:

- *Order summary information*
- *Order totals*
- *Navigation options*
- *Shipment tracking*



Field	Description
Order summary information	Key information to briefly identify the order is in the upper left corner of the *Third Streamlined Order Inquiry Screen (Order Summary)* screen.

Field	Description
Order #	A unique number the system assigns to identify a quote or order. The ship-to number follows the order number, separated by a hyphen; this number identifies each separate shipping address for the order. Order: numeric, 8 positions. Ship-to: numeric, 3 positions.
Date	The order date. This date might differ from the entered date if, for example, you did not create the order on the system the same day it was received, and wanted to back-date the order so it would receive appropriate priority for reservation and backorder purposes. Numeric, 6 positions; in user date format.
Status	The order ship-to status. Possible statuses are: • *Billing* = The order is currently being processed by the BILL_ASYNC job. If an order remains in this status, it could indicate an error in billing processing. See *Working with the BILL_ASYNC Job* for background. • *Canceled* = You have canceled all items on the order, either individually or collectively, using a cancel reason code that is not flagged to reduce demand. See *Establishing Cancel Reason Codes (WCNR)* for background on cancel reason codes. • *Error* = The order is currently flagged with an error and suspended in an order batch. See *Order Creation Errors* for background. • *Held* = The order is currently held. See *Introducing Order Hold Reason Codes* for background. • *Open* = There is at least one open, unshipped item on the order. • *Quote* = This is a pre-order quote. See *Entering Pre-Order Quotes* for background. • *Suspended* = The order is currently suspended in an order batch. See *Introducing Order Batches* for background. • *Closed* = The order is shipped, canceled with a cancel reason flagged to reduce demand, or partially shipped and the remainder of the lines canceled. This is also the status displayed if the Order Header status is *Purged*. **Header and Ship To status different?** If the status for the Order Header is different from the status for the Order Ship To, the Order Ship To status is displayed, unless: • If the Order Ship To is open and the Order Header is held, the held status is displayed. • If the Order Ship To is suspended and the Order Header is in error, the error status is displayed.
Ship via	The code for the shipper who delivers the merchandise to your customer. The description of the ship via is to the right. Ship via codes are defined in and validated against the Ship Via table. See *Working with Ship Via Codes (WVIA)*. Ship via: numeric, 2 positions. Description: alphanumeric, 30 positions.
Order type	A code that identifies how the quote or order was received, such as by phone or through the order API. You can also use the order type to identify special kinds of orders, such as those you generate as part of a membership program. Order types are defined in and validated against the Order Type table. See *Establishing Order Types (WOTY)*. Alphanumeric, 1 position.

Field	Description
Entered by user	The user ID of the person or process who entered the order. Alphanumeric, 10 positions; display-only.
Web order #	The order number, if any, defined in the E-Commerce order number field in the Order Header Extended table. This is the web order that was passed through the *Generic Order Interface (Order API)* and used to identify the order in an external system. For more information, see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). In the case of a retail pickup or delivery order assigned through the *Order Orchestration Integration*, this is the order number in the system originating the order. • If the originating system is Order Administration, the system prefaces the originating order number with the text `ORIG#:`. For example: `ORIG#:9999-001`, where `ORIG#:` indicates the order originated in Order Administration, `9999` is the original order number in Order Administration, and `001` is the ship to number. • In addition, if the originating order number begins with `ORIG#:`, the system also displays the following message below the web order number: `This order is fulfilling the originating order shown above`. See *Retail Pickup (including Ship-for-Pickup) or Delivery Orders* for more information. Alphanumeric, 30 positions.
Order totals	The totals for the Order Ship To are in the center top of the *Third Streamlined Order Inquiry Screen (Order Summary)* screen, to the left of the *Navigation options* and to the right of the *Order summary information*.
Merchandise	The total value of the items on the quote or order, excluding freight, additional charges, service charges, tax (but including hidden tax if the order is subject to VAT), handling, and duty. The merchandise total does not include items that are canceled, sold out, or returned. **Note:** If you create a return by entering an order for a negative quantity, the merchandise total and the other totals are negative amounts. Numeric, 20 positions with a 2-place decimal.
Tax	The total sales tax for the quote or order, based on the value of the merchandise and, optionally, freight and special handling charges. If the order is subject to VAT, tax is generally included in the item price rather than in the Tax field. Use standard order inquiry to review the hidden tax for order lines. Numeric, 20 positions with a 2-place decimal.

Field	Description
Freight	The total charge for shipping the quote or order, not including additional freight charges. You can define additional freight charges for a carrier to include standard freight; in this case, the freight charges are 0.00. This field also includes service charges by ship via, if any, or order weight charges based on the ship via defined for each ship to customer on the order. See *Working with Ship Via Codes (WVIA)*. The system calculates freight charges based on the freight method defined for the source code. If the system calculates freight as a percentage of the merchandise charges, there might be a penny variation in total freight amount due to rounding differences. Numeric, 20 positions with a 2-place decimal.
Add’l freight	The total dollar amount for freight charges, in addition to the base freight charge for the quote or order. Additional freight charges are defined in the Ship Via table. Examples of additional freight charges are overnight shipping or second day delivery. The Add'l freight field here corresponds to the Frt+ field in Order Entry. Numeric, 20 positions with a 2-place decimal.
Handling	The cost of any special handling on the quote or order, such as personalizing, monogramming, or engraving, and any gift wrapping charges. If there are any duty charges on the order, they are included in the Handling total. See *Work with Duty Rates Screen*. You can review the special handling instructions and charges for items at the *Order Detail Window*. Numeric, 20 positions with a 2-place decimal.
Add’l charge	This field can include charges or credits. Additional charges might include: **Additional source code charge** An additional charge for services that apply to the source code or offer. The system applies the additional charge to the quote or order based on the total dollar value of the merchandise. **Credits** A credit you apply to the customer's order, such as reimbursement for long distance telephone charges or a promotion discount that is not applied to the merchandise, freight charges, or additional freight charges. **Additional shipper/item charge** An additional charge that applies to the item based on the shipper. Such charges might apply when the item exceeds established shipping rates, such as for oversized items. **Dollar discounts** A credit applied based on the total dollar value of the merchandise. You can define dollar discounts by source code or offer. If the *Prorate Dollar Discounts and Coupons (D90)* system control value is selected, the dollar discounts are applied to the detail lines on the quote or order rather than appearing as a negative additional charge. The Add'l charges field displayed here corresponds to the Chg field in Order Entry. Numeric, 13 positions with a 2-place decimal.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Total</td><td>The total amount the customer owes for the quote or order, including:
• Merchandise
• Freight
• Additional freight charges
• Taxes (excluding any hidden tax (VAT))
• Handling
• Duty
• Additional charges
The total does not include charges for canceled, returned or sold out items.
Numeric, 20 positions with a 2-place decimal.</td></tr>
</table>

Field	Description
Discount	The total discount applied to the order shipping address. The total discount is calculated by comparing the selling price of merchandise with the item/SKU offer price. If you use a price override on any of the detail lines: • If the price override reason code's *Override item offer price* field is selected, the Ord discount includes any discounts that reduce the selling price from the price override amount you entered for the detail line. • If the price override reason code's *Override item offer price* field is unselected, and: • you override an existing item/SKU offer price for the item: the Ord discount includes the difference between the original item/SKU offer price and the final selling price, including the price override and any other discounts. When the system adds an item to the order at no charge (for example, an accompanying item) and the price override reason code defaults from the *Default Price Override Reason (B35)* system control value, then the regular offer price of the item is not included in the discount amount. • there is no item/SKU offer price for the item: the detail line does not affect the Ord discount total. **Note:** The setting of the *Override item offer price* field has no effect on orders you receive through the e-commerce interface. If there is a price override reason code in the new order message, the system always processes these orders as if the field is unselected. See *Overriding the Item/SKU Offer Price* for an overview of the *Override item offer price* field. **Note:** This field is not included if the *Display Discount on Order Recap Screen (D38)* system control value is unselected or if no discount applies to the order. Any dollar discounts by source code or offer appear as a negative additional charge if the *Prorate Dollar Discounts and Coupons (D90)* system control value is selected. Numeric, 20 positions with a 2-place decimal.
Shipment tracking	Information on each order shipment is below the *Order summary information*. This information is from the Manifest Upload Audit table, and is not available if the order was shipped as a brokered backorder through integration with Order Orchestration. The screen displays a maximum of 20 shipments.
Ship via	The description of the ship via used for the shipment. Ship via: numeric, 2 positions. Description: alphanumeric, 30 positions.

Field	Description
Tracking number	The shipping tracking number, as reported through the *Generic Pick In API (Shipments, Voids, and Backorders)*, or through *Manually Confirming Shipments (MCON)*. For more information see the Web Services Guide on My Oracle Support (ID 2953017.1). **Live link?** The tracking number is a live link: • If not using the *Narvar Integration*: The ship via type is UPS, Federal Express, or Parcel Post (*not* Parcel Post Class 1, 2, 3, or 4). If the link is live, you can click it to advance to the shipper's web site and review shipment history. • If using the *Narvar Integration*: This is a live link enabling you to track the shipment, provided: • You have completed setup of the related system control values, including the *Narvar Track URL Prefix (M60)*. • You have specified the *Narvar Carrier Name* and *Narvar Carrier Service Code* for the ship via. • You specified a tracking number when confirming the shipment. • All other configuration was completed for Narvar, as described under *Narvar Integration Setup*. • After you enable Narvar, tracking number links that were created previously do not work automatically when you click on them at this screen. • The tracking number link can still be available if all the above requirements are met, even if the customer did not receive a shipment confirmation when, for example, the customer has opted out of email communication. • The tracking link is not supported for drop ship purchase orders or shipments made through the Order Orchestration integration. The tracking link is supported for drop ship picks. • The *Narvar Track URL Prefix (M60)* is required for a valid tracking number link to be enabled in emails or on screens. If you are using the Narvar integration and submit an order request to Narvar while the tracking URL prefix is not defined, the Narvar.log file contains errors such as: `Shipment tracking is disable for company 123` `Unable to construct shipment tracking URL for order 456` Where `123` is the company number and `456` is the order number. **Error displayed:** Also, if the tracking URL is not defined, when you click on the tracking number link at the screens mentioned above, an error window indicates: `Tracking information not available. Check Narvar Order Error Export screen for failures.` However, a Narvar Order Error Export record is not created because the tracking number link could not be created correctly if there are no other issues with the order request to Narvar. Alphanumeric, 30 positions.
Date and time shipped	The date and time when the package was scanned for shipment, as reported through the *Generic Pick In API (Shipments, Voids, and Backorders)*, or through *Manually Confirming Shipments (MCON)*. For more information see the Web Services Guide on My Oracle Support (ID 2953017.1). Date: numeric, 6 positions; in user date format. Time: numeric, 6 positions (HH:MM:SS format).

Navigation options

Option	Procedure
Review order history	Select *History* to open the History Window. **Note:** This option is available only if there is at least one Order Transaction History message on the order.
Review or enter order messages	Select *Messages* to open the Order Messages Window. The word *Messages* is blue if there are already any messages on the order.

Option	Procedure
Advance to order maintenance	Select *Maintain* to advance to the Work with Order Screen in Order Maintenance. **Authority:** • This option displays only if you have authority to the Order Maintenance Access (A22) secured feature and the order is not in an error or suspended status. Also, if the order includes one or more printed order lines, this option displays only if you have authority to the Maintain Order with Printed Quantity (J05) secured feature. • You cannot advance to order maintenance if the order is locked by a user. • You must have authority to the Maintain Brokered Fulfillment Orders (B20) secured feature to maintain an order whose Broker delivery type is *Retail pickup* or *Delivery*. **Note:** When you return to *Streamlined Order Inquiry (DORI)* from Order Maintenance, the system displays the First Streamlined Order Inquiry Screen (Find Order or Customer) before displaying the information for the order you just maintained. Do not select any options until the system displays the order you maintained; any updates you made in Order Maintenance will be reflected on the Third Streamlined Order Inquiry Screen (Order Summary).

Option	Procedure
Review loyalty account information for a customer that is registered in the Oracle Retail Customer Engagement Loyalty program	Select *Loyalty*. When you select this option, the system retrieves the sold to customer's information from Oracle Retail Customer Engagement. • If Oracle Retail Customer Engagement finds a loyalty card assigned to the customer, the system advances you to the *Display Loyalty Account Screen*. If more than one loyalty card is assigned to the customer in Oracle Retail Customer Engagement, the system displays loyalty account information for the first card assigned to the customer. • If Oracle Retail Customer Engagement does not find a loyalty card for the customer, the system advances you to the *Customer Loyalty Registration Window*, where you can select to enroll the customer in the Oracle Retail Customer Engagement Loyalty program. • If a connection could not be made to Oracle Retail Customer Engagement, the system displays an error message similar to the following: `Unable to connect to ORCE`. **Note:** This option displays only if the Use ORCE Loyalty (M06) system control value is selected and a Relate ID is defined for the sold to customer in the Customer Sold To table; see *Customer Engagement Loyalty Integration*.

Option	Procedure
Review the customer's purchase history from Oracle Retail Customer Engagement	Select *Purch Hist*. When you select this option, the system retrieves the sold to customer's information from Oracle Retail Customer Engagement and advances you to the *Display Purchase History Screen* where you can review the completed sales and returns transactions from Oracle Retail Customer Engagement. If a connection could not be made to Oracle Retail Customer Engagement, the system displays an error message similar to the following: `Unable to connect to ORCE`. **Note:** This option displays only if the *ORCE Customer Integration (L37)* system control value is set to *INTERACT*; see *Customer Engagement Purchase History Integration*.
Return to your search results	Select *Exit* to return to the *Second Streamlined Order Inquiry Screen (Search Results)*.
Review order properties	Select *Properties* or scroll down to display the *Properties* area.
Review payment information	Select *Payment* or scroll down to display the *Payment* area. **Note:** This option is displayed even if there are no payment methods on the order.
Review invoices	Select *Invoices* or scroll down to display the *Invoices* area. **Note:** This option is available only if there is at least one Invoice for the order.

Option	Procedure
Review carton contents	Select *Carton Contents* or scroll down to display the *Carton Contents* area. **Note:** This option is available only if there is at least one Carton Contents record for the order.
Review refunds	Select *Refunds* or scroll down to display the *Refunds* area. **Note:** This option is available only if there is at least one refund record for the order.

Products

Purpose: This area of the *Third Streamlined Order Inquiry Screen (Order Summary)* screen provides information on each item on the order.

Field	Description
Line #	A number the system assigns to each item as it is added to the order. A quote or order can have up to 999 lines. Numeric, 3 positions.
Item	A code that identifies a unit of inventory. Item codes are defined in and validated against the Item table. **Note:** The code displayed is the item alias if the customer ordered using an alias and the *Display Item Alias (D56)* system control value is selected. Alphanumeric, 12 positions.

Field	Description
SKU	An item's unique characteristics, such as its size and color. **Note:** The first 14 positions of the SKU description is displayed instead of the SKU elements if the *Display SKU Description in place of SKU Element (F25)* system control value is selected. Alphanumeric, three 4-position fields or one 14-position field.
Name	The first 30 positions of the description of the item. This is the base item description if the item has SKU's. Alphanumeric, 30 positions.
S (Status)	A one-position code indicating the current status of the item on the order. Possible statuses are: • blank = The order line is currently open. • *Express Bill* = You have entered the order using an express-bill ship via, but the BILL_ASYNC process has not yet processed the invoice. See *Working with the BILL_ASYNC Job* for background. • *Cancelled* = You have canceled the item using a cancel reason code that is not flagged to reduce demand. See *Establishing Cancel Reason Codes (WCNR)* for background on cancel reason codes. • *Error* = The order line is currently flagged with an error, and the order is suspended in an order batch. See *Order Creation Errors* for background. • *Held* = The order line is currently held. You can hold a line on an open order to prevent it from printing on a pick slip, even if it is available. • *Soldout* = The item has been sold out. An order line can be sold out: • manually in order entry or maintenance through the *Sell Out* option • automatically in order entry or maintenance, based on the soldout control code assigned to the item • through the Process Auto Soldouts option See *Managing Soldouts and Backorders* for background. • *Closed* = The item has been shipped, canceled with a cancel reason flagged to reduce demand, or partially shipped and the remainder of the ordered quantity canceled.
B (Order Orchestration)	This field is set to *B* if the order is fulfilled through integration with Order Orchestration, regardless of whether this is a ship-for-pickup, store pickup, delivery, or retail pickup order, if the order line is a brokered backorder, or the order status. See the *Order Orchestration Integration* for more information.

Field	Description
Price	The actual unit price of the item after applying any discounts, breaks, or overrides. Discounted or overridden item prices are highlighted if the *Display Order Line Discount Messages (F01)* system control value is selected. Numeric, 13 positions with a 2-place decimal.
Qty ordered	The number of units of the item that the customer ordered. Numeric, 5 positions.
Qty reserved	The number of units of the item that are currently reserved from stock. The system does not reserve stock on quotes until they are converted to standard orders; see *Converting Quotes to Orders*. The reserved quantity is reduced when an item is canceled, confirmed for shipment, or unreserved using Interactive Reservation. The system updates this quantity at billing. Numeric, 5 positions.
Qty printed	The number of units included on a printed pick slip. *Pre-generated picks:* The system does not update this field when you create a pre-generated pick for the order line during pick slip preparation; the system updates this quantity when you generate a pick slip . See *Applying Pick Slip Preparation to an Order* and *Performing Pick Slip Generation*. *Voiding a pick slip:* The system reduces the printed quantity if you void the pick slip and don't reprint, or when shipment of the item is confirmed. *Order Orchestration?* If the order line has been assigned to Order Orchestration for fulfillment (brokered backorder) or if the customer is picking up the order at a store (store pickup), the print quantity here is equal to the ordered quantity. In the case, the Drop ship flag at the *Order Detail Window* is set to *D*, although for a brokered backorder, the BO warehouse indicates your distribution center. See *Brokered Backorders* or *Store Pickup Orders* for background. Numeric, 5 positions.
Qty shipped	The number of units that have shipped. The system updates this quantity at billing. This quantity is negative for a return processed by entering a negative quantity in order entry. Place your cursor over the shipped quantity to display the most recent shipment date for the item on the order. The text `No Ship Date Found` displays if the system could not find a shipment date for the item on the order. Numeric, 5 positions.
Qty returned	The number of units that the customer has returned. This quantity is zero for a return processed by entering a negative quantity in order entry. Numeric, 5 positions.

Field	Description
Expected date	*Backordered item:* The date a purchase order for this backordered item is expected. **Note:** This field is not displayed for a reserved item, a brokered backorder item, or if there are no open purchase orders for the item. *Drop ship item:* This date is displayed for drop ship items if the *Assign Drop Ship Expected Ship Date (I59)* system control value is selected. See that system control value for more information. Numeric, 6 positions; in user date format.
Total	The extended price of the line, calculated as: `Unit price * Order quantity = Extended price` Numeric, 20 positions with a 2-place decimal.

Option	Procedure
Review more information about the order detail line	Click the icon ( ) in the *Detail* column to open the *Order Detail Window*.
Review or enter order detail messages	Click the icon ( ) in the *Msg* column to open the *Order Detail Messages Window*. The icon is blue ( ) if any messages already exist for the order line.

Customers

This area of the *Third Streamlined Order Inquiry Screen (Order Summary)* screen provides the name, address, phone number(s), and email address of:

- the sold-to customer who placed the order
- the shipping address for the order
- the bill-to customer, if any, associated with the order

Note:

If the name and address for the bill-to customer and sold-to customer are identical, the bill-to customer is not displayed.

Field	Description
Sold To Information	The sold-to information identifies the customer who placed the order.

Field	Description
Name	Last name, first name, and middle initial of the customer placing the order. Last name: alphanumeric, 25 positions. First name: alphanumeric, 15 positions. Middle initial: alphanumeric, 1 position.
Company	The name of the company associated with the customer placing the order. Alphanumeric, 30 positions.
Address	Up to four lines indicating the street address and apartment or suite number. First address line: alphanumeric, 32 positions. Apartment or suite: alphanumeric, 10 positions (to the right of the first address line). Address lines 2-4: alphanumeric, 30 positions each.
City	The city where the customer lives or receives mail and shipments. Alphanumeric, 25 positions.
State	The state where the customer lives or receives mail and shipments. State codes are defined in and validated against the State table, accessible through the Work with Countries menu option; see Setting Up the Country Table (WCTY). Alphanumeric, 2 positions.
Postal code	The postal or zip code for the customer's address. Alphanumeric, 10 positions.
Country	The three-position code identifying the customer's country. Included only if the country does not match the *Default Country for Customer Address (B17)*. Country codes are defined in and validated against the Country table; see Setting Up the Country Table (WCTY). Alphanumeric, 3 positions.
Phone numbers	The customer's daytime and evening phone numbers, including any formatting set up through the *Work with Telephone Number Format Screen*. The mobile phone number is also displayed if the *Phone Numbers (D15)* system control value is set to *MOBILE*; however, if this system control value is set to *FAX*, the fax number is not displayed. Also, any extensions are not displayed. Alphanumeric, 14 positions each.
Email address	The order-level email address, if any. See *Working with an Order-Level Email Address* for information on how the system determines the email address to assign to an order. Alphanumeric, 50 positions.

Field	Description
OptIn	The opt-in/opt-out setting for the email address. Possible settings are: • *All* = Email is the preferred method of correspondence. • *Order* = Use email for order-related correspondence only; generate a document for other correspondence. • *None* = Do not use email for any correspondence; generate a document instead. • *Don't Ask* = Do not ask the customer for his/her email address; the customer has already been asked and has declined to provide it. The system does not generate any email correspondence to the customer, even if an email address is specified.
Ship to information	The ship-to information identifies the shipping address of the order, which can be an order ship-to, a permanent ship-to address for the sold-to customer, or a recipient who is another sold-to customer.
Name	The last name, first name, and middle initial of the ship-to. Last name: alphanumeric, 25 positions. First name: alphanumeric, 15 positions. Middle initial: alphanumeric, 1 position.
Company	The name of the company associated with the ship-to. Alphanumeric, 30 positions.
Address	Up to four lines indicating the street address and apartment or suite number. First address line: alphanumeric, 32 positions. Apartment or suite: alphanumeric, 10 positions (to the right of the first address line). Address lines 2-4: alphanumeric, 30 positions each.
City	The city where you ship the order. Alphanumeric, 25 positions.
State	The state where you ship the order. State codes are defined in and validated against the State table, accessible through the Work with Countries menu option; see Setting Up the Country Table (WCTY). Alphanumeric, 2 positions.
Postal code	The postal or zip code for the shipping address. Alphanumeric, 10 positions.
Country	The three-position code identifying the country for the shipping address. Included only if the country does not match the *Default Country for Customer Address (B17)*. Country codes are defined in and validated against the Country table; see Setting Up the Country Table (WCTY). Alphanumeric, 3 positions.

Field	Description
Phone numbers	The customer's daytime and evening phone numbers, including any formatting set up through the *Work with Telephone Number Format Screen*. The mobile phone number is also displayed if the *Phone Numbers (D15)* system control value is set to *MOBILE*; however, if this system control value is set to *FAX*, the fax number is not displayed. Also, any extensions are not displayed. **Note:** The system stores a single phone number for an order ship-to. Alphanumeric, 14 positions each.
Email address	The email address associated with the shipping address. If there is not a separate shipping address, this is the sold-to customer's primary email address. Alphanumeric, 50 positions.
Bill to information	Bill-to information is included if the sold-to customer is associated with a bill-to account and the names and addresses for the two records are not identical.
Name	The last name, first name, and middle initial of the bill-to account. Last name: alphanumeric, 25 positions. First name: alphanumeric, 15 positions. Middle initial: alphanumeric, 1 position.
Company	The company name for the bill-to. Alphanumeric, 30 positions.
Address	Up to four lines indicating the street address and apartment or suite number. First address line: alphanumeric, 32 positions. Apartment or suite: alphanumeric, 10 positions (to the right of the first address line). Address lines 2-4: alphanumeric, 30 positions each.
City	The city where the bill-to is located. Alphanumeric, 25 positions.
State	The state where the bill-to is located. State codes are defined in and validated against the State table, accessible through the Work with Countries menu option; see Setting Up the Country Table (WCTY). Alphanumeric, 2 positions.
Postal code	The postal or zip code for the bill-to address. Alphanumeric, 10 positions.
Country	The three-position code identifying the country for the bill-to address. Included only if the country does not match the *Default Country for Customer Address (B17)*. Country codes are defined in and validated against the Country table; see Setting Up the Country Table (WCTY). Alphanumeric, 3 positions.

Field	Description
Phone numbers	The bill-to customer's daytime and evening phone numbers, including any formatting set up through the *Work with Telephone Number Format Screen*. The mobile phone number is also displayed if the *Phone Numbers (D15)* system control value is set to *MOBILE*; however, if this system control value is set to *FAX*, the fax number is not displayed. Also, any extensions are not displayed. Alphanumeric, 14 positions each.
Email address	The bill-to customer's email address. Alphanumeric, 50 positions.

Properties

This area of the *Third Streamlined Order Inquiry Screen (Order Summary)* screen provides additional information about the order as a whole.

Field	Description
Source	The source code from the order header. Source codes are unique codes used to identify segments of your customer base or a rented list. Each source code is assigned to one offer and one division. Source codes control the freight and pricing method used on an order. Alphanumeric, 7 positions.
Entered date	The date when the order was created. Numeric, 6 positions; in user date format.
Entered time	The time of day the order was originally created. Numeric, 6 positions (HH:MM:SS format).
Ship complete	Determines whether all the items on an order must ship together. Valid values are: • *Selected* = Ship all items on the order in one shipment; delay printing pick slips until all items are available in the requested quantities. • *Unselected* = (default): Ship the items on the order as soon as they are reserved.
Arrival date	The date the customer requests to receive the order. The arrival date defaults to the order date, but you can override this default. Numeric, 6 positions; in user date format.
Purchase order #	The purchase order number under which the order was placed. From the `ref_transaction_no` if the order is a retail pickup or delivery order received from Order Orchestration. See *Building the Retail Pickup (including Ship-for-Pickup) or Delivery Order* for more information. Alphanumeric, 15 positions.

Field	Description
Cancel BO	Identifies whether to automatically cancel items that are unavailable (backordered) with the first shipment on the order. Valid values are: • *Selected* = Cancel backordered items with first shipment. • *Unselected* = (default): Do not cancel backordered items. If this field is selected, any unshipped line on an order is canceled during billing using the *Auto Soldout Cancel Reason (C20)*, provided this system control value specifies a valid cancel reason code.
Cancel date	The date, if any, the customer wants the order canceled if it has not been shipped. The order is not canceled automatically, but is listed on the *Order Cancellation List*. You can cancel the order manually or contact the customer to extend the deadline. Numeric, 6 positions; in user date format.
BO priority	A code that determines the priority for order fulfillment on a backordered item. Defaults from the *B/O priority (Backorder priority)*, if any, specified for the source code; in this case, the header-level value defaults to the *Priority* field on the order detail line. Priority codes range from 0-9, where: *0* = Low priority. *9* = High priority.
Calculate freight	Determines whether the system calculates and adds freight charges and any service charges by ship via to the order: • selected (default) = the system calculates freight based on the freight method defined for the source code on the order header • unselected = the system does not calculate freight
Weight	The total shipping weight of the items on the order. Numeric, 20 positions with a 3-place decimal.
Freight override	Indicates the freight charges for the Order Ship To if they were applied as an override. Numeric, 13 positions with a 2-place decimal.
Gift	If this field is selected, this is a gift order, which means: • item prices do not print on the pick slip • the system generates a gift acknowledgment to notify the sold-to customer who placed the order that the order has shipped

Field	Description
Tax code	The code and description of the tax status on the order. Valid values are: • *T* = *Standard tax*. The customer is subject to all applicable state sales tax on merchandise. • *N* = *Non taxable*. The customer is not taxed on purchases. • *R* = *Resale*: The customer purchases goods for resale, so is exempt from tax. A valid tax identification number must be specified for the customer or entered during Order Entry. • *E* = *Exempt*. The customer is a school or charity, so is exempt from tax. A valid tax identification number must be specified for the customer or entered during Order Entry. • *G* = *GST only*. The customer is subject to the Canadian Goods and Services Tax (GST) because the order is shipping to a Canadian province. • *P* = *PST only*. The customer is subject to the Canadian Provincial Services Tax (PST), but exempt from the GST. See *Working with Customer Tax Status* for more information.
Tax identification	The customer’s tax identification number, typically the certificate that identifies the customer as a reseller or tax exempt; otherwise, the tax identification number does not control taxability. This number is required when the customer's tax code is *R* (Reseller) or *E* (Exempt). Alphanumeric, 30 positions.
Warehouse	A code that identifies the warehouse from which merchandise on the order ships. A value appears in this field only if it was entered during order entry or order maintenance or was passed through the *Order Orchestration Integration* for a retail pickup or delivery order. The warehouse description is to the right. Warehouse code: numeric, 3 positions; display-only. Warehouse description: alphanumeric, 30 positions; display-only.
Quote origin	If this field is selected, the order originated from a pre-order quote. See *Entering Pre-Order Quotes* for an overview and the required setup.
Broker delivery type	Indicates whether the order is being fulfilled through the *Order Orchestration Integration*. Possible settings are: • *Retail pickup* = The order originated in an external system and Order Administration ships the order to the originating retail store location, where the customer picks it up • *Delivery* = The order originated in an external system, and Order Administration ships the order directly to the customer • *Ship for Pickup* = The order originated in Order Administration, and Order Administration ships the order to a designated retail store location, where the customer picks it up • *Store Pickup* = The order originated in Order Administration, and the customer is picking the order up in a designated retail store location, where the inventory is already available • blank = This is not an order being fulfilled through Order Orchestration, or it is a brokered backorder (in which Order Administration assigns backordered items to Order Orchestration for fulfillment).

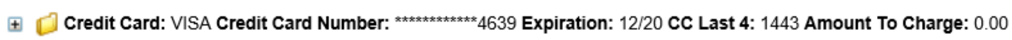
Field	Description
Batch #	The system-assigned number for a group of orders. Orders you receive through the order API are assigned to the *Default Batch for E-Commerce Orders in Error (G41)* if they are in error; similarly, retail pickup or delivery orders that are in error are assigned to the *Order Broker Error Batch Number (K90)*. The system removes the batch number when you accept the batch if the order is error-free. Numeric, 5 positions; display-only.

Payment

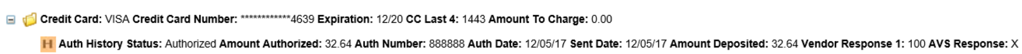
This area of the *Third Streamlined Order Inquiry Screen (Order Summary)* screen provides summary information about the payment methods used on the order.

> **Note:**
>
> This screen does not include complete payment method details, such as information on deferred or installment billing.

Additional options for credit card payment methods: A plus sign next to a credit card payment method indicates that there is additional information available.



Click the plus sign to display any authorization and deposit history. See *Credit Card Authorization and Deposit History* for field descriptions.



> **Note:**
>
> If you move your cursor over a payment method, it changes color; however, this color change does not indicate that the payment method is an active link.

Field	Description
Payment category	Indicates the category that defines the basic rules for processing a payment. Each payment type is assigned to a payment category. Possible categories are: • Cash/Check • Credit Card (including stored value cards and debit card) See *Working with Pay Types (WPAY)* for background.
Pay type description	The description of the pay type is to the right of the description of the payment category. Alphanumeric, 30 positions.
Credit card number	**Credit card pay types only:** The credit card number the customer used on the order. Alphanumeric, 20 positions; display-only.

Field	Description
Expiration	**Credit card pay types only:** The date the credit card is no longer active. The expiration date might be zero if the *Require expiration date* flag for the pay type is not selected. For example, a stored value card credit card type typically does not require an expiration date. Numeric, 4 positions (MMYY format); display-only.
CC last 4	The last four positions of the credit card number. From the CC Last 4 field in the Order Payment Method table. Alphanumeric, 4 positions; display-only.
Amount to charge	The amount to charge this payment method. Always 0.00 for the “catch-all” payment method on an order, meaning any dollar amount not assigned to another payment method applies to this one. **Note:** If this is a prepay amount, and part of the prepayment total was applied to a membership program, only the remaining amount appears as the amount to charge or amount billed. For example, if the customer sent a check for 100.00 and 80.00 was applied to the membership program, 20.00 appears here. See *Membership Overview*. Numeric, 20 positions with a 2-place decimal.

Credit Card Authorization and Deposit History

The information described below is available in the *Payment* area of the *Third Streamlined Order Inquiry Screen (Order Summary)* screen by clicking the arrow next to a credit card payment method.

Field	Description
Authorization history	The authorization history is flagged with a letter *H*. See *Display Authorization History Screen* for background.
Auth history status	A description of the status of the authorization as updated by the system. Possible statuses are: • *Sent for authorization* • *Authorized* • *Not yet sent* • *Declined* • *Authorized but not used* • *Mismatch Auth/Deposit* (created for authorizations during deposits) • *Voided*

Field	Description
Amount authorized	The amount submitted for authorization and approved by the credit card authorization service. Numeric, 20 positions with a 2-place decimal.
Auth number	A number assigned by the authorization service for the authorization transaction. Alphanumeric, 16 positions.
Auth date	The date the authorization service approved the amount to be charged. Numeric, 6 positions; in user date format.
Sent date	The date you transmitted the authorization to the authorization service. Numeric, 6 positions; in user date format.
Amount deposited	The amount deposited to the bank for the charge. Numeric, 20 positions with a 2-place decimal.
Vendor response 1	A code indicating the response, if any, from the authorization service. Although the response can be up to 10 positions, only the first four positions are displayed. Alphanumeric, 4 positions.
Vendor response 2	A code indicating the credit card security response, if any, from the authorization service. Although the response can be up to 10 positions, only the first four positions are displayed. Alphanumeric, 4 positions.
AVS response	A code indicating the address verification response, if any, from the authorization service. Although the response can be up to 10 positions, only the first four positions are displayed. Alphanumeric, 4 positions.
Deposit history	See *Display Deposit History Screen* for background.
Deposit history status	The status of this deposit: • *Confirmed* = The service bureau confirmed the deposit. • *Deleted* = The user deleted a rejected deposit. • *Forced* = The deposit was rejected, but was forced through deposit (the Forced deposit field for the authorization service is selected). • *Manual confirmation* = The user manually confirmed the deposit through Submit Rejected Deposits. • *Prepaid* = The user entered a prepaid adjustment amount. • *Resubmitted* = The deposit was resubmitted for deposit. • *Sent* = The deposit is in the process of being sent to the service bureau. • *Unconfirmed* = The deposit is unconfirmed by the service bureau. • *Written off* = The user wrote off a rejected deposit. • *Not yet sent* = The deposit has not yet been sent to the service bureau.
Invoice #	The number the system assigns to a customer's bill or credit. The system generates an invoice during billing. Numeric, 7 positions.

Field	Description
Type	Indicates the type of deposit: • **PURCH* = Purchase (debit) • **RETURN* = Return deposit (credit) Alphanumeric, 10 positions.
Deposit date	The date when this deposit history record was created. This is the date when the invoice pay method was deposited. Numeric, 6 positions; in user date format.
Deposit amount	The amount deposited. The amount is negative for a return. For a flexible payment option, calculated as follows: • For deferred payment plans: `prepaid amount - adjustment amount - total amount deposited to date = deposit amount` • For installment payment plans: `prepaid amount - adjustment amount - total amount deposited to date / intervals remaining = deposit amount` Numeric, 20 positions with a 2-place decimal.
Response	The response code from the Credit Card Deposit History table. Alphanumeric, 10 positions.

Invoices

This area of the *Third Streamlined Order Inquiry Screen (Order Summary)* screen provides summary information about the shipment or credit invoices billed against the order.

Field	Description
Invoice #	The number the system assigns to a customer's bill. *Assigned when?* If the *Generate Invoice Number at Pick Gen (H80)* or *Generate Invoice # at Pick Gen without Address Match (K81)* system control value is selected, the system assigns the invoice number at pick slip generation if the order is eligible; otherwise, it assigns the invoice number at billing. Numeric, 7 positions.
Date	The date the invoice record was created by billing. Numeric, 6 positions; in user date format.
Type	Indicates the type of invoice: • *C* = Credit memo. Typically generated when you process a return or apply a negative additional charge after billing the order. Credit and return amounts appear as negative numbers when you review invoice information. • *I* = Invoice. Generated when you bill a shipment. The system does not consolidate credit invoices with other credits or with debit invoices. Alphanumeric, 1 position.
Merch	The total dollar value of the merchandise. Merchandise amount does not include tax (with the exception of hidden tax, or VAT), handling, additional charges, or freight. Numeric, 20 positions with a 2-place decimal.

Field	Description
Freight	The freight charges for the invoice. This amount may not be equal to the total of all the line-level freight charges. Numeric, 20 positions with a 2-place decimal.
Tax	The sales tax for the invoice. This field includes GST and PST, if any. This field does not include hidden tax. Numeric, 20 positions with a 2-place decimal.
Handling	The cost of any special handling billed or credited on the invoice. Examples include personalizing, monogramming, or engraving, and any gift wrapping charges. Any duty charges on the invoice are also included in this total. Numeric, 20 positions with a 2-place decimal.
Add’l charge	The total additional charges billed or credited on the current invoice. See *Add’l charge* for examples. Numeric, 20 positions with a 2-place decimal.
Add’l freight	The total dollar amount for freight charges exceeding the order's base freight charge. This is a shipper-level charge directly associated with the order, as opposed to the line item. Additional freight is defined for the shipper in the Ship Via table. Examples of additional freight charges that might apply include charges for overnight shipping, second day delivery, or padded van. Additional freight charges may include the standard freight charges, depending on how you have set up the ship via. If you set up a ship via this way, the Freight field is blank. Numeric, 20 positions with a 2-place decimal.
Total	The total amount billed or credited, including all related merchandise charges, freight, tax, handling, additional charges, and additional freight. Numeric, 20 positions with a 2-place decimal.

Option	Procedure
Print order receipts for each ship-to on the order	Click the order receipt icon to generate the order receipt:  • This icon is available only if the *Order Receipt Print Program (L46)* system control value specifies a program and if there are any invoices on the order ship-to that you are currently reviewing. • If this is a multi-recipient order, the system generates an order receipt for all ship-tos. • The screen displays an error message when you click this icon if the only invoices on the order are credits: `No eligible invoices found to print on Order Receipt`.

Option	Procedure
Review the invoice detail records related to the items shipped or returned on the order.	Click the icon ( ) in the *Detail* column to open the *Invoice Detail Window*. This icon is not included for a credit invoice created by applying a negative additional charge to the order, since in this case there are no invoice details.

Carton Contents

This information can come from*Generic Pick In API (Shipments, Voids, and Backorders)* .

For more information, see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Field	Description
Pick #	A unique number assigned by the system to identify the pick slip. Numeric, 7 positions.
Carton #	Identifies the carton number containing the items shipped on the pick slip. Set to *1* unless you used multiple cartons to ship the pick slip. Numeric, 3 positions.
Item	The code identifying the item shipped. Alphanumeric, 12 positions.
SKU	The item's unique characteristics, such as its color or size. Included only if the item has SKUs. Alphanumeric, three 4-positions fields.
Qty	The quantity of the item shipped in this carton. Numeric, 3 positions.
Pack date	The date when the carton was packed or shipped. From the shipment date passed through the pick in API. Numeric, 6 positions; in user date format.
Pack time	The time when the carton was packed or shipped. From the shipment time passed through the pick in API. Numeric, 6 positions (HH:MM:SS format).
Packer	The packer passed through the pick in API. Alphanumeric, 10 positions.

Refunds

This area of the screen provides information on any refunds that have been generated for the order. See *Issuing Refunds* for background.

Field	Description
Pay type	The code identifying the pay type to be refunded. This pay type might be different from the payment method used to pay for the order if the pay type has an alternate refund type or alternate refund category; see *Working with Pay Types (WPAY)* for background. Numeric, 2 positions.

Field	Description
Pay type desc	The description of the pay type to be refunded. Alphanumeric, 30 positions.
Status	The status of the refund. Possible statuses are: • Cancel Pending (the refund will be canceled the next time you process refunds) • Cancelled • Held • Open • Processed • Write-off pending (the refund will be written off the next time you process refunds) • Written off
Deposit	Indicates whether the refund has been deposited. A deferred or installment payment plan can prevent the system from depositing a refund in order to offset the deferred or installment amount. For example, if the order payment amount of 60.00 is deferred for 30 days and the customer receives a refund for 20.00, instead of refunding the customer 20.00, the system subtracts the refund amount from the order payment amount. The customer will then pay 40.00 at the end of the 30 days. Valid values are: • *Y* = The refund has been deposited (there is a Deposit created date for the Invoice Payment Method). • *N* = The refund has not been deposited.
Current category	The description of the payment category for the pay type to be refunded. Possible categories are: • Cash/Check • Credit Card (including stored value cards and debit card)
Original category	The payment category of the original payment method used on the order. Possible categories are: • Cash/Check • Credit Card (including stored value cards and debit card)
Amt collected	The amount that you are refunding to the customer. Numeric, 20 positions with a 2-place decimal.
Date created	The date the refund was generated through order activity such as a return. Numeric, 6 positions; in user date format.
Date processed	The date, if any, when the refund was processed, written off, or canceled. Numeric, 6 positions; in user date format.
Manual hold	Indicates whether you applied a manual hold against the refund through *Working with Refunds, Writeoffs and Balances Due (WREF)*: *Y* = Manual hold applies *N* = No manual hold applies
Hold until	The date when the refund is eligible for processing. Numeric, 6 positions; in user date format.

Pop-Up Windows

Purpose: The pop-up windows available at the *Third Streamlined Order Inquiry Screen (Order Summary)* are:

- *History Window*
- *Order Messages Window*
- *Order Detail Window*
- *Order Detail Messages Window*
- *Invoice Detail Window*

History Window

Purpose: Use this window to review the activity that has taken place related to the order since it was created. This is the same information available at the *Display Order History Screen*.

How to display this window: Click *History* in the Navigation area at the top of the *Third Streamlined Order Inquiry Screen (Order Summary)*.

Field	Description
Date	The date when the order activity occurred. Numeric, 6 positions; in user date format; display-only, updated by the system.
Time	The time when the order activity occurred. Numeric, 6 positions (HH:MM:SS format); display-only, updated by the system.
Type	A code for a type of update against the order. Valid values are: • *Auth* = Authorization received for credit card order • *Subscription* = Issue sent for subscription item • *Cancel* = Cancel through Order Maintenance • *D/S PO* = Drop ship purchase order • *Upsell Promo* = Promotion discount applied • *Refund* = Refund processed • *Hold* = Hold through Order Maintenance or as a result of credit checking • *Retail Order* = Retail transaction. Used only if you use the *Retail Integration (External System to Order Administration)*. • *BO Cards* = Backorder card evaluation and update to the Order Detail record. See *Purchase Order Layering and Backorder Notifications* for an overview. The actual generation of the backorder notice is listed under *Letter*.

Field	Description
	• *Letter* (L) = Notification (card, email, *Narvar Integration*, or *Outbound Email XML Message (CWEmailOut)*) generated for the customer or vendor related to the order. The Transaction Note provides information on the notification type and customer address, for example: Ord Conf to first.last@example.com. For more information, see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). **Narvar notices:** When you use the *Narvar Integration*, the *Letter* notification type for a shipment email can be: • Order sent to Narvar: The *Narvar Order Request Message* was generated, even if the email address specified was the *Narvar Non-Deliverable Email Address for Shipment Confirmations (M59)*. See that system control value for more information. • Failure sending order to Narvar: The *Narvar Order Request Message* could not be generated. For example, this message could mean that the *Narvar Integration Setup* was not correct. • Order not eligible to be sent to Narvar: This message can indicate: – This is a store pickup order. – This is a fulfilling order for an order assigned back from Order Orchestration if the *Use OROB for Fulfillment Assignment (M31)* system control value is selected. – This is a retail pickup order that is a fulfilling order for a ship-for-pickup order, and the merchandise was shipped to the store location for customer pickup. – The user ID and password specified for Narvar Service are not valid. See *Work with Outbound Web Service Authentication Screen* for more information. **For more information:** See *Narvar Troubleshooting*. • *Maint* = Maintenance through Order Maintenance. The system also uses this code when it applies a prorated discount or when activity takes place related to the *Order Orchestration Integration*. • *Rtn Auth* = Return authorization processed • *Sold Out* = Order sold out automatically during Billing, based on the value in the S/O field for the Item, and a soldout notification generated. • *Pick Gen* = Pick slip generated. The system also uses this code when an item stock allocation error occurs, or when the ship via on the order is overridden through the best way shipping option at pick slip generation.

Field	Description
	• *Release* = Release through Order Maintenance, Release Held Orders program or by the system (from time hold for prepaid orders). • *Shipment* = Shipment logged when pick slips generated for all order lines. • *Sale* = Shipment billed. • *System Update* = – CSV removed for security, or – a promotion was not applied to the order because the Allow Manual Entry of Promotion Code (I63) system control value was selected • *Call Tag* = Call tag printed. This option is not currently implemented. • *Unreserved* = Interactive reservation. Indicates that an item was reserved or unreserved manually, such as through Working with Interactive Reservation (MIRV) or Reprinting and Voiding Pick Slips (WVRP or WSVP). • *Void/Reprint* = Pick ticket voided through Reprinting and Voiding Pick Slips (WVRP or WSVP) or Void Pick Batch (WSVP). • *Price Override* = Price override. Indicates that the user entered a price override. • *User Defined* = Reserved for user-defined order transaction history entries. • *ROL Error* = The system did not print a pick slip for the specified order line because the Qty remaining or Qty printed in the Reserved Order Line table does not match the Qty reserved or Qty printed in the Order Detail table. The system also prints the order line on the Unmatched Reserved/Remaining Qty Report.
Transaction note	The description of the activity related to the transaction, such as: • Authorization • Flag for cancellation due to declined authorization • Backorder notification evaluation and Order Detail update • Backorder notice generated (for example. BO 1st Ntf for a first backorder notification) • Cancel • Cancel request for a drop ship item • Cancel confirm or reject for a drop ship item • CSV removed for security • Drop ship • Hold • Ln#: 2 Submitted To Broker (or other activity related to Order Orchestration; see Order Orchestration Integration for more information) • Ord Conf to ssmith@example.com (Order confirmation email or *Outbound Email XML Message (CWEmailOut)*) For more information, see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). • Pk 1236612 Whs 1 Ct/Bn 1234734/411/1 if the Use Cart/Bin Picking? (B38) system control value is selected and: – you use standard pick slip generation, or, – you use streamlined pick slip generation and the *Bypass Creation of Pick Forms during WSPS Pick Generation (K55)* system control value is unselected • Pk 1236609 Whs 1 Batch # 1234731 if: – the *Use Cart/Bin Picking? (B38)* system control value is unselected, or – you use streamlined pick slip generation and the *Bypass Creation of Pick Forms during WSPS Pick Generation (K55)* system control value is selected • Promotion (PROMO1) not applied • Maintenance

Field	Description
	• Release • Retrn conf (Return confirmation email or *Outbound Email XML Message (CWEmailOut)*) For more information, see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). • Sale • Ship conf (Shipment confirmation email or *Outbound Email XML Message (CWEmailOut)*) For more information, see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). • , • Shipment Confirmed for drop ship PO # XXXX. For confirmed shipment of a drop ship item, the transaction notes also include item code, meter charge, weight, ship via and description, and tracking number. • Sold out • Subscription generation • Pick not printed Ln # 001 qty mismatch *Special character?* If there are any special characters in an Order Transaction History message, the system replaces the special character, excluding any underscores, with a space when you display the message at the *Display Order History Screen*; however, the *History Window* might display the special character as a series of alphanumeric characters, such as `\u000F`. Alphanumeric, 40 positions; display-only.
Amount	The total order amount following the order activity, including merchandise, freight, tax, handling, etc. No amount is associated with issuing a subscription, as the system bills the customer for the entire amount of the subscription when billing the order. Numeric, 20 positions with a 2-place decimal; display-only.
User	The user ID of the person who performed this activity against the order. If the system performs the activity automatically, such as releasing prepaid orders on time hold, the user ID is the name of the person who started the ASYNC processing program (background jobs). If the activity took place through a system process or an API, the user ID indicates the process or API; otherwise, the system uses your default user. Alphanumeric, 10 positions; display-only.

Order Messages Window

Purpose: Use this window to review or work with free-formatted order-level messages. These are the same messages you can work with at the *Work with Order Messages Screen*.

See *Adding Order Messages* for background on working with order messages, including the print requirements and limitations of including messages on different forms; however, important differences between the Work with Order Messages screen and the Order Messages window are:

- *Default messages:* At the *Work with Order Messages Screen*, you can apply a message set up through *Working with Default Messages (WMSG)*; however, this option is not available through *Streamlined Order Inquiry (DORI)*.

- *Message sequence:* At the Work with Order Messages Screen, you can select whether to display the messages in LIFO or FIFO sequence; however, in *Streamlined Order Inquiry (DORI)*, messages are always listed in FIFO sequence.

Change or delete existing messages? The *Modify Existing Messages (A30)* secured feature controls the ability to change or delete an existing order message. If you have authority to this secured feature, double click on a line to change or delete it; see *Working with existing message lines* for instructions.

How to display this window: Click *Messages* in the Navigation area at the top of the *Third Streamlined Order Inquiry Screen (Order Summary)*. The word *Messages* is in blue rather than black if there are any existing order messages.

Field	Description
Entering new message lines	Optionally, use the upper part of the window to enter new order messages.
New message	Use this field to enter new free-form text messages. If your entry exceeds 60 positions and you do not press *Enter* to start a new line, the system splits the text into separate lines of up to 60 positions each, using the last occurring blank space before position 60 as a line break.
Print	Highlight the print option to the right of the New message field. Available options are: • *Both* = Print on both invoice and pick slip • *Check Cust* = Print on refund check only • *Gift Msg* = Gift message • *Invoices* = Print on invoice only • *Nowhere* or blank (default) = Do not print • *Picks* = Print on pick slip only • *Quote* = Print on the Quote Form • *Check Int* = Print on detachable area of refund check not visible to the customer • *User* = Print on the document defined by the user, such as a custom pick slip. If there is no user-defined document, the message does not print anywhere in Order Administration.
Click *Add* when you are done to save your changes.	
Working with existing message lines The lower part of the window displays existing order messages. You can review, change, or delete these messages.	**To change:** • Position your cursor in the message line and double-click. • Edit the text as needed and press *Exit*. You can also change the Print option next to a message line. **To delete:** • Double-click in the message line to highlight it. • Clear the Message and Print fields. • Press *Exit*. The message line is deleted, and the remaining message lines move up on the screen if the deletion left a blank line. • The *Modify Existing Messages (A30)* secured feature controls the ability to change or delete an existing order message. • See the discussion under More Print Flag Information for background before changing existing message lines.
Message	A message related to the order. Alphanumeric, 60 positions.

Field	Description
Print	Available options are: • *Both* = Print on both invoice and pick slip • *Check Cust* = Print on refund check only • *Gift Msg* = Gift message • *Invoices* = Print on invoice only • *Nowhere* or blank = Do not print • *Picks* = Print on pick slip only • *Quote* = Print on the *Quote Form* • *Check Int* = Print on detachable area of refund check not visible to the customer • *User* = Print on the document defined by the user, such as a custom pick slip. If there is no user-defined document, the message does not print anywhere in Order Administration.
Date	The date when the message was written. Numeric, 6 positions; in user date format.
Time	The time when the message was written. Numeric, 6 positions (HH:MM:SS format).
User	The user ID identifying the person who wrote the message. Alphanumeric, 10 positions.

> **Note:**
>
> Depending on your screen resolution, if there are multiple message lines the *Exit* button might not be visible. In this case, press *F12* to exit the window and return to the *Third Streamlined Order Inquiry Screen (Order Summary)*.

Order Detail Window

Purpose: Use this window to display additional information about an item on the order.

How to display this window: Click the icon ( ) in the *Detail* column next to an item in the *Products* area of the *Third Streamlined Order Inquiry Screen (Order Summary)* screen.

Field	Description
Item	The item you selected in the *Products* area of the *Third Streamlined Order Inquiry Screen (Order Summary)*. **Note:** The code displayed is the item alias if the customer ordered using an alias and the *Display Item Alias (D56)* system control value is selected. Alphanumeric, 12 positions.

Field	Description
SKU	The item's unique characteristics, such as its size and color. **Note:** The first 14 positions of the SKU description is displayed instead of the SKU elements if the *Display SKU Description in place of SKU Element (F25)* system control value is selected. Alphanumeric, three 4-position fields or one 14-position field.
Desc	The first 30 positions of the description of the item. This is the base item description if the item has SKU's. Alphanumeric, 30 positions.
Qty ordered	The number of units of the item that the customer ordered. Numeric, 5 positions.
Price	The actual unit price of the line after applying any discounts, breaks, or overrides. Discounted or overridden item prices are highlighted if the *Display Order Line Discount Messages (F01)* system control value is selected. Numeric, 13 positions with a 2-place decimal.
Source	The source code assigned to the detail line, if any. There might not be a source code on the order detail line if the *Use Source Code from Order Header When Creating Order Lines (D73)* is not selected. The source code at the line level controls demand and sales information/ posting for that item, while the source code on the order controls how to price items and calculate freight. Alphanumeric, 9 positions.
Offer	A code for the catalog, space or television advertisement from which you accept quotes and orders. The offer defined for the quote or order controls how to calculate shipping and price items. However, if you override the offer for an item (if the customer is ordering from more than one catalog, for example), demand for the item is attributed to the offer associated with the item rather than the order. Demand represents the number and dollar value of orders placed against an offer. **Note:** The system automatically overrides the offer for an item if *Override Offer on Order Detail Line (D49)* system control value is selected and the item is not sold in the offer used on the order. Offers are defined in and validated against the Offer table. See *Working with Offers (WOFR)*. Alphanumeric, 3 positions.

Field	Description
Offer price	The item price as defined for the offer. If the order was subject to VAT and tax-inclusive pricing, in which any tax is included in the Hidden tax field rather than the Tax bucket on the order, the offer price presented here is the tax-inclusive offer price. **Note:** When a price override reason applies to the order line (whether you enter an override reason manually, or if the system applies the override automatically), the override reason's *Override item offer price* setting controls whether to use the regular offer price. See *Overriding the Item/SKU Offer Price* for a discussion. Numeric, 13 positions with a 2-place decimal.
G/W	If this flag is selected, it indicates that the item is gift wrapped.
Freight	The charge for shipping the item. This total does not include additional freight charges, and is blank if the freight is calculated for the entire order instead of item-by-item. Numeric, 13 positions with a 2-place decimal.
Add'l freight	The dollar amount of shipper/item charges, as defined for the shipper and item at the *Work with Ship Via/Item Screen*. Numeric, 13 positions with a 2-place decimal.
Quantities	
Qty reserved	The number of units of the item that are currently reserved from stock. The system does not reserve stock on quotes until they are converted to standard orders; see *Converting Quotes to Orders*. The reserved quantity is reduced when an item is canceled, confirmed for shipment, or unreserved using Interactive Reservation. The system updates this quantity at billing. Numeric, 5 positions.
Qty printed	The number of units included on a printed pick slip. *Pre-generated picks:* The system does not update this field when you create a pre-generated pick for the order line during pick slip preparation; the system updates this quantity when you generate a pick slip. See *Applying Pick Slip Preparation to an Order* and *Performing Pick Slip Generation*. *Voiding a pick slip:* The system reduces the printed quantity if you void the pick slip and don't reprint, or when shipment of the item is confirmed. *Order Orchestration?* If the order line has been assigned to the Order Orchestration for fulfillment (brokered backorder) or if the customer is picking up the order at a store (store pickup), the print quantity here is equal to the ordered quantity. In the case, the Drop ship flag at the *Order Detail Window* is set to *D*, although for a brokered backorder, the BO warehouse indicates your distribution center. See *Brokered Backorders* or *Store Pickup Orders* for background. Numeric, 5 positions.

Field	Description
Qty shipped	The number of units that have shipped. The system updates this quantity at billing. This quantity is negative for returns processed by entering a negative quantity in order entry. Numeric, 5 positions.
Qty returned	The number of units that the customer has returned. This quantity is zero for a return created by entering a negative quantity in order entry. Numeric, 5 positions.
Qty canceled	The number of units that have been canceled. Numeric, 5 positions.
Qty sold out	The number of units that have been sold out, either automatically or manually. Numeric, 5 positions.
Expected ship date	*Backordered item:* the date a purchase order for this backordered item is expected. **Note:** This field is not displayed for a reserved item, a brokered backorder, or if there are no open purchase orders for the item. *Drop ship item, including brokered item:* This date is displayed for drop ship items if the *Assign Drop Ship Expected Ship Date (I59)* system control value is selected. See that system control value for more information. Numeric, 6 positions; in user date format.
Next BO date	The next date when the order line is eligible to generate a backorder notice. See *Generate Backorder Notices (GBOC)* for more information. Numeric, 6 positions; in user date format.
Entered date	The date when the order was created, or when the item was added to the order. Numeric, 6 positions; in user date format.
Arrival date	The date when the customer wants to receive this item. The arrival date entered here overrides the arrival date defined for the order. The arrival date for each item is initially set to the current date; however, you can enter some future date in order entry or maintenance to delay shipment of the item. The system defaults a future arrival date to an item with a future ship status if the item's status code matches the *Future Orders Item Status (E52)*. The future arrival date that defaults for this item comes from the *Default Future Orders Arrival Date (E53)*. The arrival date controls: • Whether the item is reserved • Whether to create a pre-generated pick for the item **Influence on Reservation** The arrival date for the item controls whether to reserve inventory as follows: `Arrival date` - *Reservation Lead Days (B27)* = `Date`

Field	Description
	The system does not reserve inventory if the result is a future date. In this case, the item is flagged as a future order and assigned a backorder status. When you run the Evaluate Future Orders process (typically, every evening) it evaluates each item flagged as a future order and reruns the arrival date calculation. When the result is no longer in the future, the process reserves the inventory. See *Scheduling Jobs* for more information. **Influence on Pre-Generated Picks** The item's arrival date also controls whether the system creates pre-generated pick. The system uses this calculation: `Arrival Date from Order Line (or Order Ship To) - (Pick Processing Days (B37) + Ship Via Lead Days in WSHV) < or = Today's Date` The system creates a pre-generated pick for the order line if this system-calculated date is less than or equal to today's date; otherwise, the system does not create a pre-generated pick for the order line until the date is within the allotted time frame. See *Selecting Order Lines for Pick Slip Preparation*. *Zone reservation rules:* For items subject to zone reservation, this date is: • the zone start date if the item was ordered before the zone season start date. • the order date if the item was ordered between the zone season start date and zone end date, provided that: • if you use *Standard Zone Reservation Rules*, the item was available or you took the order before the zone's deferred cutoff date • if you use *Alternate Zone Reservation Rules*, the item was available or had an open PO quantity • otherwise, this date is the next season's zone start date from the zone reservation dates. See *Shipping Zone Reservation Overview* for a complete discussion. You can use an order line's Arrival date as a selection criterion in pick slip generation. For zone reservation coded inventory such as plant stock, this selection insures that the item will ship at a date suitable for planting at its destination. Numeric, 6 positions; in user date format.
Cancel date	The date when the customer wants to cancel the item if it has not shipped. Numeric, 6 positions; in user date format.
Inventory	
Drop ship	Set to *D* for a drop ship item, or for a brokered backorder or store pickup order. In the case of a brokered backorder or store pickup, there is a printed quantity; for a brokered backorder, the BO warehouse indicates your distribution center. Alphanumeric, 1 position.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Warehouse</td><td>The warehouse shipping the item. Typically set to 0. Some reasons why an order line might be assigned to a specific warehouse:
this is a retail pickup or delivery order assigned to a warehouse by Order Orchestration
the order line is a return created by entering a negative quantity in order entry
the order line was express-billed
you specified a warehouse override for the order or line when creating the order, either in interactive order entry or through the order API
Warehouse code: numeric, 2 positions.
Warehouse description: alphanumeric, 30 positions.</td></tr>
<tr><td>BO warehouse</td><td>A code that identifies the warehouse assigned to ship a backordered item.
Note:
This field appears only if there is a backordered quantity of the item.
Warehouse code: numeric, 2 positions.
Warehouse description: alphanumeric, 30 positions.</td></tr>
<tr><td>Future order</td><td>This flag indicates that the arrival date for the item is too far in the future to reserve stock. The item is reserved when the current date reaches the requested arrival date minus lead days for picking and shipping.
Valid values are:
Selected = This is a future order; do not reserve inventory.
Unselected = This is not a future order and is eligible for inventory reservation.
See the Arrival date for a discussion.</td></tr>
<tr><td>Affect inventory</td><td>Indicates whether the quantity available to sell (on-hand quantity) of the item is reduced during order entry.
Valid values are:
Selected (default for a regular item) = Inventory levels are affected during order entry and when you ship the order. During order entry, reserved and open inventory increase and available inventory is decreases; when you ship the order, on-hand inventory, pickable inventory, open inventory, reserved inventory and total inventory across all warehouses decreases.
Unselected (default for a Non/inv (Non inventory) item) = Inventory is not tracked. The system does not generate a pick slip for the item if all other items on the order are backordered; when one or more backordered items are available, the system generates a pick slip for the non-inventory item as well as for the available item(s).</td></tr>
</table>

Field	Description
Bypass reservation	Indicates whether to reserve this item during order entry if inventory is available. • If the Use OROB for Fulfillment Assignment (M31) system control value is selected, the system selects this flag for each order line sent to Order Orchestration for fulfillment assignment. See Brokered Backorders. • If the *Use OROB for Fulfillment Assignment (M31)* system control value is unselected, items that bypass immediate reservation must be reserved using Interactive Reservation. See Working with Interactive Reservation (MIRV). You can define an item to bypass reservation in the Item table. Valid values are: • *Unselected* (default) = Do not bypass reservation. • *Selected* = Bypass reservation. This setting defaults from the Item table if the item is set up to bypass reservation, because it is available in a limited quantity or it is a limited edition.
Special Handling	This area of the window provides information on custom or standard special handling for the item. See Special Handling Overview for background.
Special handling	The special handling code and description identifying the type of work to be performed on the item. Special handling codes are defined in and validated against the Additional Charges table. Code: alphanumeric, 2 positions. Description: alphanumeric, 30 positions.
Special handling charge	The charge for special handling of an item. See Special Handling Overview for background. Numeric, 13 positions with a 2-place decimal.
Handling information	One or more lines of free-form text describing the handling for the item. Alphanumeric, 30 positions each line.
The following lines provide information custom special handling.	For more information on custom special handling information, see: • Special Handling Overview • Establishing Custom Special Handling Formats (WSHF) on how to set up special format detail • Working with Items on the Order on how to enter custom special handling information on an order
Label	A special handling option defined for this custom special handling format. Alphanumeric, 15 positions.
Input	The response selected for each special handling option available in the custom special handling format. These fields might be blank if, for example, you use the special handling format only to add a charge to the Handling bucket on the order. The Suppress S/H window field for the additional charge code allows you to suppress the automatic display of the special handling screen in order entry if you use a special handling code for this purpose. Alphanumeric, 45 positions.

Field	Description
Description	The description of the response, as specified at the *Work with Special Format Response Screen* when you set up the valid responses for the format. Alphanumeric, 45 positions.
Charge	The charge associated with an option in the custom special handling format. This charge is added to the Handling bucket of the order totals. Numeric, 13 positions with a 2-place decimal.
Activity	This area of the window displays order line history. See *Display Order Line History Screen* for background.
Activity	A code for a type of update against this item detail line. Valid values are: • *A = Add:* The line was added in order maintenance. • *B = Express Bill* • *C = Cancel:* includes canceling or reducing quantity using a cancel reason code flagged not to reduce demand. • *D = Discount:* You used the *Discount* option in order maintenance against a shipped order line. • *E = Exchange* • *G = Change:* Includes changes that don't affect quantity, in addition to canceling or reducing quantity using a cancel reason code flagged to reduce demand. • *O = Sold Out* • *R = Return* • *S = Shipment*
Description	The description of the activity. See above.
Date	The date when the activity occurred. Numeric, 6 positions; in user date format.
Qty	The quantity of the item affected by this activity. For example, *3-* indicates that three units of the item were canceled. Activities that do not affect the order quantity, such as changing the pricing of the order line, do not display a quantity here. This quantity is displayed differently depending on how the item was sold out; see *Processing Auto Soldout Cancellations (MASO)* for details. Numeric, 5 positions.
Exc reason	Represents a reason for the customer to exchange one item for another. Exchange reasons are defined in and validated against the Exchange Reasons table; see *Establishing Exchange Reason Codes (WEXR)*. Numeric, 3 positions.
Can reason	The reason for canceling the units or reducing the quantity. A cancel reason code is not displayed for soldout cancellations, whether you sell out the item by selecting *Sold-out* in order entry or order maintenance, or through *Processing Auto Soldout Cancellations (MASO)*. Cancel reason codes are defined in and validated against the Cancel Reason table; see *Establishing Cancel Reason Codes (WCNR)*. Numeric, 2 positions.

Field	Description
Rtn reason	Represents a reason for the customer to return an item. Return reasons are defined in and validated against the Return Reason table; see *Establishing Return Reason Codes (WRTR)*. Numeric, 2 positions.
Add reason	Represents a reason for adding an item to the order. The system requires an add reason code if: • the *Require Reason for Lines Added in Order Maintenance (D75)* system control value is selected, or • the *Required reason code* field for the item offer or SKU offer is selected. Add reason codes are defined in and validated against the Add Reason table; see *Establishing Add Reason Codes (WADR)*. Alphanumeric, 5 positions.
User	The user ID of the person who performed the activity. No user is listed if you sold out a line through *Processing Auto Soldout Cancellations (MASO)*. Alphanumeric, 10 positions.

> **Note:**
>
> Depending on your screen resolution and the contents of this window, the complete contents and the *Exit* button might not be visible. In this case, press *F12* to exit the window and return to the *Third Streamlined Order Inquiry Screen (Order Summary)*. You can review the order line information in standard order inquiry, or increase your screen resolution; see *How do I display the Order Administration screens correctly on a laptop?*

Order Detail Messages Window

Purpose: Use this window to review or work with free-formatted order-detail-level messages. These are the same messages you can work with at the *Work with Order Line Messages Screen*.

> **Note:**
>
> You cannot apply a message set up through *Working with Default Messages (WMSG)* through this window; to do so, you can use the *Work with Order Line Messages Screen*.

Change or delete existing messages? The *Modify Existing Messages (A30)* secured feature controls the ability to change or delete an existing order line message.

How to display this window: Click the icon ( ) in the *Msg* column next to an item in the *Products* area of the *Third Streamlined Order Inquiry Screen (Order Summary)* screen.The icon is blue ( )if there are any existing order line messages.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Item</td><td>The item and SKU you selected at the Third Streamlined Order Inquiry Screen (Order Summary).
Item: alphanumeric, 12 positions.
SKU: alphanumeric, three 4-position fields.</td></tr>
<tr><td>Entering new message lines</td><td>Optionally, use the upper part of the window to enter new order line messages.</td></tr>
<tr><td>New messages</td><td>Use this field to enter new free-form text messages. If your entry exceeds 60 positions and you do not press Enter to start a new line, the system splits the text into separate lines of up to 60 positions each, using the last occurring blank space before position 60 as a line break.</td></tr>
<tr><td>Print</td><td>Highlight the print option to the right of the New message field. Available options are:
• Both = Print on both invoice and pick slip
• Invoices = Print on invoice only
• Nowhere or blank (default) = Do not print
• Picks = Print on pick slip only</td></tr>
<tr><td>Click Add when you are done.</td><td></td></tr>
<tr><td>Working with existing message lines</td><td>The lower part of the window displays existing order detail messages. You can review, change, or delete these messages.
To change:
• Position your cursor in the message line and double-click.
• Edit the text as needed and press Exit.
You can also change the Print option next to a message line.
To delete:
• Double-click in the message line to highlight it.
• Clear the Message field.
• Press Exit. The message line is deleted, and the remaining message lines move up on the screen if the deletion left a blank line.
Secured feature: The Modify Existing Messages (A30) secured feature controls the ability to change or delete an existing order line message.</td></tr>
<tr><td>Message</td><td>A message related to the order line.
Alphanumeric, 60 positions.</td></tr>
<tr><td>Print</td><td>Available options are:
• Both = Print on both invoice and pick slip
• Invoices = Print on invoice only
• Nowhere or blank = Do not print
• Picks = Print on pick slip only</td></tr>
<tr><td>Date</td><td>The date when the message was written.
Numeric, 6 positions; in user date format.</td></tr>
<tr><td>User</td><td>The user ID identifying the person who wrote the message.
Alphanumeric, 10 positions.</td></tr>
</table>

Invoice Detail Window

Purpose: Use this window to review the invoice details for each item on the order that has been billed or credited.

How to display this window: Click the icon ( ) in the *Detail* column next to an item in the *Invoices* area of the *Third Streamlined Order Inquiry Screen (Order Summary)* screen.

> **Note:**
>
> This icon is available only if Invoice Details exist; it is not available for a credit invoice created by applying a negative additional charge to an order.

Field	Description
Line #	The number of the invoice line for the item. Numeric, 3 positions.
Item	The code identifying the item that shipped or was returned. Alphanumeric, 12 positions.
SKU	The item's unique characteristics, such as its color or size. Included only if the item has SKUs. Alphanumeric, three 4-position fields.
Ship qty	The shipped quantity of the invoiced item. The quantity is negative in the case of a credit invoice created for a return. Numeric, 5 positions.
Price	The actual unit price of the shipped or returned item. Numeric, 13 positions with a 2-place decimal.
Ship date	The date the invoice line shipped or the return was processed. Numeric, 6 positions; in user date format.
Return qty	The quantity of the item returned on this invoice. Numeric, 5 positions.
Return date	The most recent date when the customer returned any quantity of the item billed on this invoice. Numeric, 6 positions; in user date format.

Performing Order Maintenance

In this part: These topics describe how to update an existing order on the system:

- *Introducing Order Maintenance* describes how to access Order Maintenance to update an existing order and lists the features and restrictions of this program.
- *Selecting an Order for Maintenance* describes how to identify the order you wish to update or how to locate a particular order from a scan of orders.
- *Work with Order Screen in Order Maintenance* lists the fields you can update on the Work With Order screen, describes the results of your updates, and identifies any conditions or restrictions for updating each field.

- *Changing Item Detail Line Information in Order Maintenance* lists the fields you can update on the Work With Order Line screen, describes the results of your updates, and identifies any conditions or restrictions for updating each field for a specific item on the order.
- *Adding an Item in Order Maintenance* describes how to add an item to an existing order or how to reopen a closed or canceled order when you add an item.
- *Increasing the Quantity Ordered in Order Maintenance* describes how to increase or decrease the number of units ordered of an item and describes how to account for the item cancellation when you reduce the quantity ordered.
- *Canceling an Item in Order Maintenance* describes how to cancel a single, unshipped order detail line on an existing order and describes how to account for the item cancellation from the order.
- *Canceling an Order through Order Maintenance* describes how to cancel an entire order and describes how to account for the item cancellations resulting from the order cancellation.
- *Returning and Exchanging Items in Order Maintenance* describes how to perform an item return or exchange by first creating a return authorization, receiving the merchandise return, and crediting the customer.
- *Enter Payment Methods Screen in Order Maintenance* describes how to add a payment method to the order to release it from hold or how to change or delete payment information already defined for the order.
- *Adding a Recipient Order in Order Maintenance* describes how to enter an additional order to an existing order that will ship to a different address.
- *Maintaining Quotes in Order Maintenance* describes the updates you can apply to a pre-order quote before converting it to a regular order.
- *Converting Quotes to Orders* describes how to convert a pre-order quote to a regular order and the updates that the system performs.
- *Order Line History In API* allows you to receive order line history from an external system. For more information, see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
- *Order Maintenance API* allows you to remove a user hold or update the arrival date for an order line. For more information, see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Order Status Reports and On-line Inquiries

In this part: This part presents the reports and on-line inquiries you use to monitor order activity for your company according to a variety of criteria.

- *Order Status and Activity Reports* provides examples of the reports related to researching an order through Order Inquiry, including order cancellation reports, backorder reports, sales journals, shipment analyses, and prepaid orders lists.
- *Displaying Open Orders by Item (DOOI)* describes several on-line inquiry functions that can help you evaluate your order activity.
- *Ship Via/Item Inquiry (SVII)* describes how to review the shippable orders for different shippers, broken out by item.
- *Printing Backorder Reports by Descending Dollars (PBOD)* describes how to generate the Backorder Report by Descending Dollars and provides a sample report

- *Reviewing Operations Control Summary (FLSH)* allows you to review operations and merchandising summary information.
- *Reviewing Pending Orders (DOSS)* describes how to review orders requiring further processing or action.
- *Sales Summary (DSSS)* describes a screen you can use to review sales numbers and amounts for the current date, week, and month, as well as sales for the current date broken out by order type and entity.
- *Printing the Order Type Summary by Delivery Type Report (PDTS)* describes how to generate the Order Type Summary by Delivery Type Report and provides a sample report.

Submit Order Cancellation List Screen (POCL)

Purpose: Use this screen to print the *Order Cancellation List*, a list of orders that have impending cancellation dates due to soldout items, automatic backorder cancellation, and other cancel conditions. This information gives you the option to contact customers before canceling their orders.

Quotes: The Order Cancellation List also includes quotes that contain items whose Cancel date in the Order Detail table are older than the date you generate the report. See *Cancelling a Quote through Order Maintenance* for more information on how to cancel a quote.

How to display this screen: Enter POCL in the Fast path field at the top of any menu or by selecting this option from a menu.

Printing Backorder Reports (PBOR)

Purpose: Use this function to obtain various types of backorder reports, which give you visibility into your backorder situation, based on an item, warehouse or vendor. You may run these report for the base items only (at the model level) or for each backordered SKU.

Quotes: Items that are on backorder on quotes do not print on the backorder reports; the system includes the items on the backorder reports when the quote is converted to an order. See replace for an overview and *Converting Quotes to Orders*.

Print Backorder Report Selection Prompt Screen

The system submits a series of backorder reports if you make multiple selections on this screen.

How to display this screen: Enter PBOR in the Fast path field at the top of any menu or select this option from a menu.

Field	Description
By item	Determines whether the system will generate a backorder report that is sorted by item number. Valid values are: • *Yes* = Generate the Backorder Report by Item • *No* (default) = Do not generate the Backorder Report by Item If both this field and the Print SKU detail field are *Yes*, the system also generates the Backorder Report by Item with SKU Details.
By whse/item (By warehouse/item)	Determines whether the system will generate a backorder report that is sorted by warehouse. Valid values are: • *Yes* = Generate the Backorder Report by Warehouse • *No* (default) = Do not generate the Backorder Report by Warehouse Optionally, you may enter a valid warehouse code in the next field to run the report for a particular warehouse; if you set this field to *No*, the system runs the report for all warehouses. If both this field and the Print SKU detail field are *Yes*, the system also generates the Backorder Report by Warehouse with SKU Details.
Warehouse (Unlabeled field to the right of the By whse/item field)	The warehouse for which you want to run this report. Leave this field blank if you want to run the report for all warehouses; otherwise, enter a valid warehouse code to run the report for the specified warehouse. Warehouse codes are defined in and validated against the Warehouse table. See replace. Numeric, 3 positions; optional
By vendor	Determines whether the system will generate a backorder report that is sorted by vendor number. Valid values are: • *Yes* = Generate the Backorder Report by Vendor • *No* (default) = Do not generate the Backorder Report by Vendor. Optionally, you may type a vendor code in the next field to run the report for a particular vendor; otherwise, the system runs the report for all vendors. If both this field and the Print SKU detail field are *Yes*, the system also generates the Backorder Report by Vendor with SKU Details.
Vendor number (Unlabeled field to the right of the By vendor field)	Represents the supplier of an item you sell. Leave this field blank if you want to run the report for all vendors; otherwise, enter a valid vendor code to run the report for the specified vendor. Vendor codes are defined in and validated against the Vendor table. See replace. Numeric, 7 positions; optional.

Field	Description
By vendor w/PO	Determines whether the system will generate a backorder report that is sorted by vendors with open (unreceived or partially received) purchase orders. Valid values are: • *Yes* = Generate the *Backorder Report by Vendor w/PO* • *No* (default) = Do not generate the Backorder Report by Vendor w/PO Optionally, you may type a vendor code in the next field to run the report for a particular vendor; otherwise, the system runs the report for all vendors. No backordered items will be listed on this report if there are no open POs for these items. If both this field and the Print SKU detail field are *Yes*, the system also generates the *Backorder Report by Vendor/SKU/PO*.
Vendor number (Unlabeled field to the right of the By vendor w/PO field)	Represents the supplier of an item you sell. Leave this field blank if you want to run the report for all vendors; otherwise, enter a valid vendor code to run the report for the specified vendor. Vendor codes are defined in and validated against the Vendor table. See replace. Numeric, 7 positions; optional.
Print SKU detail	Determines whether the backorder report(s) will list the backordered items at the base item (model) level or at the SKU level. Valid values are: • *Yes* = List the backordered level for each SKU • *No* (default) = List the backorders at the base item level only An example of a base item is SILK DRESS. SKUs may exist for this item to identify the various styles in which the item is sold, such as PETITE/RED; PETITE/BLUE; PETITE/WHITE, etc. If you do not print the SKU detail, the system will identify the backorder level at the top level (SILK DRESS); otherwise, if you print the SKU detail, the system will list the backorder level only for each backordered SKU of the item.

Printing the Sales Journal (PDSJ)

Purpose: Use this option to specify the date range, and optionally, the division for which you want to print a Sales Journal. This report provides a detailed audit trail of all sales transactions for the specified date range (and division, if specified), including all shipments, returns, credits and no charge sales transactions. The system registers a sales transaction when a shipment occurs.

This report provides a detailed listing of sales activity for the specified invoice date range.

Understanding this report: This report is divided into two halves; the left half provides sales information relating to each invoice and the right half provides information about how each sale was posted. The invoice totals on the report are from the Invoice Ship To record.

Out-of-Balance Invoices

If an invoice is out of balance: An invoice is flagged as out of balance on the Sales Journal and Sales Journal by Division if the total Merchandise, Freight, Additional freight, Tax, Handling, and Additional charge for all Invoice Pay Method records do not equal the corresponding totals for the Invoice Ship To record. If the Invoice Pay Method total is higher than the Invoice Ship To total, the out-of-balance amount is negative; otherwise, if the Invoice Pay Method total is lower than the Invoice Ship To total, the out-of-balance amount is positive.

How can an invoice be out of balance? Invoices should ordinarily never be out of balance, but sometimes it is possible for this situation to occur if, for example, there is a rounding difference in the tax calculation on an order with multiple payment types.

Error report: Use the *Printing Sales Journal Errors (PSJE)* menu option to print a report listing just the out-of-balance invoices for a time period.

Fixing an out-of-balance invoice: Contact your Order Administration representative for assistance in fixing an out-of-balance invoice.

Reporting by Division

When you run the report, you can choose to run it by division. If so, the report lists all sales transactions for the division and starts a new page for each division. The division code is determined by the source code used on the order header.

If you do not print the report by division, the report lists sales transactions in invoice number/ date sequence.

How to display this screen: Enter PDSJ in the Fast path field at the top of any menu or select Print Daily Sales Journal from a menu.

Field	Description
Invoice date from	The beginning date to include on the report. The invoice date represents the date when the shipment or return credit occurred. This field defaults to the current date. Numeric, 6 positions (in user date format); required.
Invoice date to	The ending date to include on the report. The invoice date represents the date when the shipment occurred. This field defaults to the current date. Numeric, 6 positions (in user date format); required.
Print by division	Indicates whether you want to sort, subtotal, and page break the report by sales division. If not, the report lists all sales transactions sorted by invoice date/number. Valid values are: • *Selected* = Sort the Sales Journal by sales division; see *Sales Journal by Division*. • *Unselected* (default) = Sort the Sales Journal by invoice date and invoice number; see *Standard Sales Journal*.

Instructions:

1. Enter or verify the date range you want to include on the Sales Journal. The system defaults the current date in the Invoice date from and Invoice date to fields.
2. *Select* the Division field if you want to print sales transactions grouped by sales division (the *Sales Journal by Division*); otherwise, the report lists sales transactions by invoice number/date (the *Standard Sales Journal*).
3. Select *OK* to accept your entries.

4. Select *Accept* to print or reprint the Sales Journal for the specified invoice date.

Printing the Sales Journal by Pay Type (PSJP)

Purpose: Use this option to print the *Sales Journal by Pay Type*, a detailed audit trail of all sales transactions for the specified date range, including all shipments, returns, credits and no charge sales transactions, grouped by payment method and payment plan type. The system registers a sales transaction when a shipment occurs.

This report provides:

- a detailed listing of sales activity for the specified invoice date range
- totals for each pay type
- a grand total for all paytypes

Understanding this report: This report provides information about the individual charges on each invoice, grouped by pay type. The totals on this report are from the Invoice Pay Method records.

The individual order charges in the Merchandise, Freight, Add'l frt, Tax, Handling, and Add'l charge columns on the left side of the report are totaled in the Total invoice field on the right side of the report.

This report provides totals for the number of credits (refunds) and invoices (shipments) for each payment plan type, each pay type and page breaks between each pay type. A grand total is provided at the end of this report.

How to display this screen: Enter PSJP in the Fast path field at the top of any menu or select Print Sales Journal by Pay Type from a menu.

Field	Description
Invoice date range	The date range for which you want to run this report. The invoice date range represents the dates on which shipments occurred. Both fields default to the current date. Numeric, 6 positions (in user date format); required.

To print the report:

Enter or verify the date range for which you want to print the *Sales Journal by Pay Type*. The current date defaults to the Invoice from and Invoice to fields.

Printing the Sales Journal Summary (PSJM)

Purpose: Use this report as an audit trail of consolidated sales information for an entity, offer, period, or invoice date. This report summarizes all invoice records by offer or invoice date for a month and shows how these invoices were posted.

This report shows your cost for the items sold, the price at which you sold these items, and the corresponding gross profit dollars and gross profit percentage you realized from these sales. The totals on this report are from the Invoice Ship To records.

This report is typically used by the Accounting department to reconcile the month's sales figures.

How to display this screen: Enter **PSJM** in the Fast path field at the top of any menu or select Print Sales Journal Summary from a menu.

Field	Description
Start date	The earliest date for which you want to print sales figures on this report. Only invoices printed on this date, and up to the date in the End date field will be included. This field defaults to the current date. Numeric, 6 positions (in user date format); required.
End date	The last date for which you want to print sales figures on this report. Only invoices printed up to this date, starting from the date in the Start date field will be included. This field defaults to the current date. Numeric, 6 positions (in user date format); required.
By period	Controls whether to print the Sales Journal Summary by Period. This report sorts in offer code sequence within period, and provides consolidated sales information for each offer, in relation to accounting period. Totals are provided for each period, and a grand total of sales for all periods is provided at the bottom of the report. Valid values are: • Selected= Run the Sales Journal Summary by Period, which summarizes sales information by period. • unselected (default) = Do not run this report.
By offer	Controls whether to print the Sales Journal Summary by Offer. This report provides consolidated sales information for each offer. A grand total of sales for all offers is provided at the bottom of the report. This report is sorted in alphanumeric offer code sequence. Valid values are: • Selected = Run the Sales Journal Summary by Offer, which summarizes sales information by offer. • Unselected (default) = Do not run this report.
By merch$ (By merchandise dollars, descending)	Controls whether to print the Sales Journal Summary by Descending Dollars. This report sorts in descending (highest-to-lowest) dollar order for each offer within each period, and provides consolidated sales information for each offer, within each accounting period. A grand total of sales for all periods is provided at the bottom of the report. Valid values are: • Selected= Run the Sales Journal Summary by Descending Dollars, which summarizes sales information by descending dollar value. • Unselected (default) = Do not run this report.
By invoice date	Controls whether to print the Sales Journal Summary by Invoice Date. This report sorts by invoice date and division, and provides consolidated sales information for each offer. A grand total of sales for all periods is provided at the bottom of the report. Valid values are: • Selected = Run the Sales Journal Summary by Invoice Date, which summarizes sales information by invoice date and division • Unselected (default) = Do not run this report.

Field	Description
By entity/offer	Controls whether to print the Sales Journal Summary by Entity/Offer. This report sorts in offer code sequence within entity, and provides consolidated sales information for each offer, in relation to entity. Totals are provided for each entity, and a grand total of sales for all entities is provided at the bottom of the report. Valid values include: • Selected = Run the Sales Journal Summary by Entity/Offer, which summarizes sales information by entity. • Unselected (default) = Do not run this report.

Note:

You must select at least one of the sort selection fields described above (By period; By offer; By merch$ descending; By invoice date; By entity/offer). A report prints for each sort selected.

Instructions

1. Verify or enter the range of dates for which you want to report sales information.
2. Select the desired report by selecting the By period, By offer, By merch$ descending, By invoice date and/or By entity/offer field(s).
3. Select OK to submit the report(s) for printing.

- Sales Journal Summary by Period
- Sales Journal Summary by Offer
- Sales Journal Summary by Descending Dollars
- Sales Journal Summary by Invoice Date
- Sales Journal Summary by Entity/Offer

Printing Sales Journal Errors (PSJE)

Purpose: Use the *Sales Journal Errors Report* to identify invoice records that are out of balance. Invoices that are out of balance are also flagged on the *Standard Sales Journal* and *Sales Journal by Division*.

How can an invoice be of balance? Invoices should ordinarily never be out of balance, but sometimes it is possible for this situation to occur if, for example, there is a rounding difference in the tax calculation on an order with multiple payment types.

If an invoice is out-of-balance: An invoice is flagged as out-of-balance if the total Merchandise, Freight, Additional freight, Tax, Handling, and Additional charge for all Invoice Pay Method records do not equal the corresponding totals for the Invoice Ship To record. If the Invoice Pay Method total is higher than the Invoice Ship To total, the out-of-balance amount is negative; otherwise, if the Invoice Pay Method total is lower than the Invoice Ship To total, the out-of-balance amount is negative.

Fixing out of balance invoices: Contact your Order Management System representative for assistance if any invoices are out of balance.

Print Sales Journal Errors Screen

How to display this screen: Enter *PSJE* in the Fast path field at the top of any menu, or select Print Sales Journal Errors from a menu.

Completing this screen: Confirm that the Start date and the End date are correct, or override the dates if needed, then select *Submit*. Both fields default to the current date.

Printing the Order Shipment Analysis (POSA)

Purpose: Use this screen to obtain the *Order Shipment Analysis Report*, a list of the shipments for the specified date.

How to display this screen: Enter POSA in the Fast path field or select this option from a menu.

> **Note:**
>
> The system uses program CSR0604 to print this report.

Field	Description
Date	The date for which you want to review shipment activity. Numeric, 6 positions (in user date format); required.

Printing the Open Prepaid Order List (POPP)

Purpose: Use the *Open Prepaid Order List* to see relevant balance and payment information on all open prepaid orders. This report also shows refund or balance due figures where applicable. The report sorts in ascending customer number order.

To print the report, enter *POPP* in the Fast path field at the top of any menu, or select this option from a menu. There is no prompt screen to complete.

Print the Order Addition Report (PAAR)

Purpose: Use the *Order Addition Audit Report* to review the add reason codes used to add items to orders in order entry or order maintenance.

If the replace system control value is *selected*, the system requires an add reason code each time you add an item to an order in order maintenance.

If the Require reason code field for an item offer or SKU offer is *selected*, the system requires an add reason code each time an operator adds an item to an order in order entry or order maintenance.

You can use add reason codes to track the reasons for adding items to orders; for example, mis-shipments, exchanges, or to replace an item or SKU that is backordered.

You specify the period you want to include in the report; also, you can include a specific add reason code or all codes.

> **Note:**
>
> You can also define this report as a periodic function to include in your periodic processing. To do so, you should first use replace to create the function, using the program name CSR0646. You then use replace to add the function to your daily process.

When the report runs as part of your daily process, it includes all add reason codes for that day.

How to display this screen: Select Print Order Addition Audit Report from a menu or enter PAAR in the Fast path field at the top of any menu.

Field	Description
Add reason	The reason for adding an item to an order in order entry or order maintenance. Add reasons are defined in and validated against the Add Reason table; see *Establishing Add Reason Codes (WADR)*. Numeric, 5 positions; optional.
To	The last date of the period you want to include in the report Numeric, 6 positions; required
From	The first date of the period you want to include in the report. Numeric, 6 positions (in user date format); required.

Instructions:

1. Enter an add reason code if you want to print a report for this reason alone.
2. Enter beginning and ending dates for the report in the From and To fields.
3. Select *OK*. The system validates your entries and highlights any fields you need to correct. Correct the entries again.
4. The system submits the job PRT_OAAR, which produces the *Order Addition Audit Report*, and returns you to the previous screen.

Printing the Sales Tax Report by State (PSTX)

Purpose: Use the *State Tax Report* to review tax, GST, and PST totals by state for all debit invoices and credit invoices within a given date range.

Determining the shipping address:

- If there is a shipping address recorded in the Invoice Address table, the system uses this address to calculate the tax for the invoice. The system saves the shipping address in this table if the replace system control value is *selected*.
- If there is no shipping address in the Invoice Address table, the system determines the shipping address as follows:
  - If there is an order-level (temporary) shipping address, use this address.
  - If the order shipped to a Customer Sold To or to a permanent Customer Ship To, use the address that was in effect at the time of the shipment, based on any address changes recorded in the Customer Address Change table. See

Reviewing Customer Address Changes for more information on address change history. If there is no record of an address change since the date of the shipment, the current address provides the information for tax calculation.

How to display this screen: Enter *PSTX* in the Fast path field at the top of a menu or select Print Sales Tax Report by State from a menu.

Field	Description
Starting date	The first date to include on the report. Invoices and credits processed on this date or later will be included. The starting date cannot be later than the ending date. Numeric, 6 positions (in user date format); required.
Ending date	The last date to include on the report. Invoices and credits processed on this date or earlier will be included. The ending date cannot be later than the current date. Numeric, 6 positions (in user date format); required.

Printing the State Tax Detail Report (PSTD)

Purpose: Use the *State Tax Detail Report* to review invoices and credits by state for a given period, including details such as shipping and handling as well as state taxes and customer tax status.

Determining the shipping address:

- If there is a shipping address recorded in the Invoice Address table, the system uses this address to calculate the tax for the invoice. The system saves the shipping address in this table if the replace system control value is *selected*.
- If there is no shipping address in the Invoice Address table, the system determines the shipping address as follows:
  - If there is an order-level (temporary) shipping address, use this address.
  - If the order shipped to a Customer Sold To or to a permanent Customer Ship To, use the address that was in effect at the time of the shipment, based on any address changes recorded in the Customer Address Change table. See *Reviewing Customer Address Changes* for more information on address change history. If there is no record of an address change since the date of the shipment, the current address provides the information for tax calculation.

How to display this screen: Enter PSTD in the Fast path field at the top of any menu or select Print State Tax Detail Report from a menu.

Field	Description
Country	The country for which you want to run the report. Country codes are defined in and validated against the Country table; see *Setting Up the Country Table (WCTY)*. Alphanumeric, 3 positions; required.

Field	Description
State	The state or province for which you want to run the report. The report will include invoices for customers whose shipping address matches the state you enter. The state you enter must be valid for the country you selected, above. Alphanumeric, 2 positions; required.
Currency	The currency associated with the source code specified on the order header. Currency codes are defined in and validated against the Currency table; see *Working with Currency (WCUR)*. The default local currency specified in the System Control table appears here. The description of the currency appears to the right. This field appears only if the replace system control value is *selected*. Alphanumeric, 3 positions; required
Starting date	The first date to include on the report. Invoices and credits processed on this date or later will be included. The starting date cannot be later than the ending date. Numeric, 6 positions (in user date format); required.
Ending date	The last date to include on the report. Invoices and credits processed on this date or earlier will be included. The ending date cannot be later than the current date. Numeric, 6 positions (in user date format); required.

Printing the Order Demand/Sales Reports (PSSR)

Purpose: Use these reports to review order and demand information such as order number, merchandise total and gross margin for orders within a given date range. Available reports are:

- *Salesman Demand Report* by Date: open, held and shipped orders within the given date range and is sorted by salesman number.
- Salesman Shipped Report by Date: shipped and partially shipped orders within the given date range and is sorted by salesman number.
- Source Demand Report by Date: open, held and shipped orders within the given date range and is sorted by source code.
- *Source Shipped Report* by Date: shipped and partially shipped orders within the given date range and is sorted by source code.

Quotes: The system includes quotes in these reports. *Q* displays in the Order Status field for orders flagged as quotes. The Quantity Returned, Quantity Reserved, and Quantity Shipped totals are always *0* for quotes. See replace for more information.

How to display this screen: Enter PSSR in the Fast path field at the top of any menu or select Print Demand/Shipped Report from a menu.

Field	Description
Date from	The starting date from which you want to run this report. Orders entered on or after this date display on the report. You must enter a valid date that is not later than the ending date. Numeric, 6 positions (in user date format); required.

Field	Description
Date to	The ending date from which you want to run this report. Orders entered on or before this date display on the report. You must enter a valid date that is not earlier than the start date. Numeric, 6 positions (in user date format); required
Report option	The type of Order Demand/Sales report you wish to generate. Valid values are: • *Salesman Demand Report by Date* = This report displays order and demand information for open, held and shipped orders within the given date range and is sorted by salesman number. • *Salesman Shipped Report by Date* = This report displays order and demand information for shipped and partially shipped orders within the given date range and is sorted by salesman number. • *Source Demand Report by Date* = This report displays order and demand information for open, held and shipped orders within the given date range and is sorted by source code. • *Source Shipped Report by Date* = This report displays order and demand information for shipped and partially shipped orders within a given date range and is sorted by source code. Required

Item Purchase and Sales Aging Report (LIPS)

Purpose: Use the *Item Purchase and Sales Aging Report* to review purchase and sales history, such as open purchase order quantity and on hand quantity for items in a selected warehouse. This report places sales and receipt quantities into weekly aging buckets.

How to display this screen: Enter LIPS in the Fast path field at the top of any menu or select Item Purchase and Sales Aging Report from a menu.

Field	Description
Selected warehouse	The warehouse containing the items whose purchase and sales history you wish to review. Warehouse *1* defaults in this field. If you leave this field blank, the system displays purchase and sales information for items located in warehouse *0*. Numeric, 3 positions; optional.
Select vendor	The vendor whose purchase and sales history you wish to review. Leave this field blank if you wish to review purchase and sales information for all vendors. Numeric, 7 positions; optional.
On hand only	Identifies whether you want to review purchase and sales information for items containing an on hand quantity only. Valid values are: • *Unselected* = Display purchase and sales history for all items. • *Selected* = Display purchase and sales history for items containing an on hand quantity only.

Print Order Control Report (POCT)

Purpose: Use the *Operations Control Report* to review the flow of order activity and merchandising activity for a period of time. This report provides a high-level overview of the fulfillment process, identifies potential bottlenecks or problem areas, and delivers an audit trail of order activity.

The system uses the Order Control Summary table to track the total figures used to build this report; see *Reviewing Operations Control Summary (FLSH)*.

Periodic function to update backorder totals: You must include the *PFR0062* periodic function as part of your periodic processing to have correct and up-to-date ending order balance totals on the report. This periodic function must be run at the end of the day, when the background jobs have ended. In addition to performing this update to the table, the periodic function also submits the *ORDSUM* job, which generates the Order Control Report using the current date.

Order Control Report Screen

How to display this screen: Enter *POCT* in the Fast path field at the top of any menu, or select Print Order Control Report from a menu.

Field	Description
Start date	The first date to include on the report. Numeric, 6 positions (in user date format); required.
End date	The last date to include on the report. Numeric, 6 positions (in user date format); required.

Note:

Both dates must be earlier than the current date. The information on the report would be incomplete if you did not run the periodic process to update backorder totals. See above.

Completing this screen: Complete the start and end date fields and select *Submit*. The system submits the job *ORD_CONTRL*, which generates the *Operations Control Report*.

Printing the Held Order Report (PHOR)

Purpose: Use this option to print the *Held Order by Reason Code Report*, which lists held orders in your company. You can restrict the report to a particular hold reason code, pay type, or ship via priority.

Quotes: This report does not include held quotes.

Option in Modern View: You can also generate this report by selecting *Print Held Orders* at the **Manage Held Orders** page in Modern View.

Print Held Orders Report Screen

How to display this screen: Enter *PHOR* in the Fast path field at the top of any menu, or select Print Held Orders Report from a menu.

Field	Description
Reason code	Optionally, enter the code identifying the reason why an order is on hold, or leave this field blank to include held orders regardless of reason. Hold reason codes are defined in and validated against the Order Hold Reason Code table; see *Establishing Order Hold Reason Codes (WOHR)*. **Note:** The Awaiting Credit Card Auth (CW) hold reason is not included on the report. Alphanumeric, 2 positions; optional.
Pay type	Optionally, enter the code identifying the payment type used on the order, or leave this field blank to include held orders regardless of payment type. Pay types codes are defined in and validated against the Pay Type table; see *Working with Pay Types (WPAY)*. Numeric, 2 positions; optional.
Ship via priority	Optionally, enter the code identifying the *Priority (Ship via priority)* assigned to the ship via on the order, or leave this field blank to include held orders regardless of ship via priority. Numeric, 1 position; optional.

Completing this screen: Select *Submit* after completing any of the optional fields to submit the *HELD_ORDS* and *HO_RPT* jobs, which generate the *Held Order by Reason Code Report*.

Printing the Daily Business Status Report (DBST)

Purpose: Use this report to review a high-level summary of sales, cash, inventory, order activity, and shipments.

Daily Business Status Screen

To print: Enter a processing date in the Enter processing date field and select *Submit* to generate the *Daily Business Status Report*. The current date defaults in the Enter processing date field, but you can override it to a prior date.

Periodic function: You can also run the *Daily Business Status Report* periodic function (program name *ACR0178*) to generate this report; in this case, the report date is the current date.

How to display this screen: Enter *DBST* in the Fast path field at the top of a menu or select Daily Business Status Report from a menu to advance to the Daily Business Status screen.

Printing the Order Reconciliation Report (PORS)

Purpose: Use this menu option to print the *Order Reconciliation Report*, which summarizes the total number of orders, units, and merchandise dollars by status in your company.

Order Reconciliation Report Screen

How to display this screen: Enter *PORS* in the Fast path field at the top of any menu, or select Order Reconciliation Report from a menu.

Field	Description
Start date	The first date to include on the report. Numeric, 6 positions (in user date format); required.
End date	The last date to include on the report. Numeric, 6 positions (in user date format); required.

Completing this screen: Select *Submit* after completing the date fields to submit the *ORD_SUMMRY* job, which generates the *Order Reconciliation Report*.

Printing the Sales Journal by Currency Report (PSJC)

Purpose: Use this menu option to print the *Sales Journal by Currency Report* based on a selected invoice date range and optionally currency code. This report provides a detailed audit trail of all sales transactions for a specified invoice date range, including all shipments, returns, credits, and no charge sales transactions, grouped by currency, invoice date, pay plan type, and pay type. The system registers a sales transaction when a shipment occurs.

This report provides:

- a detailed listing of sales activity for a specified invoice date range and currency.
- totals for each currency, pay type, pay plan type, and invoice date in the local currency and the alternate (foreign) currency.
- a grand total across all pay types and currencies in the local currency.

Understanding this report: This report provides information about the individual charges on each invoice, grouped by currency, invoice date, payment plan, and pay type.

The individual order charges in the Merchandise, Freight, Additional freight, Tax, Handling, and Additional charge columns on the left side of the report are totaled in the Total invoice field on the right side of the report.

This report provides totals for the number of credits (refunds) and invoices (shipments) for each currency, invoice date, payment plan type, pay type combination. A page break occurs between each currency, invoice date, payment plan type, pay type combination. A grand total displays at the end of the report.

Print Sales Journal by Currency Screen

Use this screen to select the invoice date range and currency code(s) to print on the Sales Journal by Currency report. If you do not select a currency code, the system prints the report for all currencies based on the invoice date range you define.

How to display this screen: Enter *PSJC* in the Fast path field at the top of a menu or select Print Sales Journal by Currency from a menu.

Field	Description
Invoice date range	The date range for which you wish to run this report. The invoice date range represents the dates on which shipments occurred. Both fields default to the current date. Numeric, 6 positions (in user date format); required.
Currency code	The currency associated with the invoices you wish to print on the report. Only invoices and invoice credits associated with the currency you select, print on the report. Leave this field blank if you wish to print the report for all currencies, based on the invoice date range you define. The currency associated with the invoice is defined in the Order Header Extended table. The conversion rate is also stored in this table. If the currency code and conversion rate in the Order Header Extended table are blank, the invoice is for the local currency. Currency codes are defined in and validated against the Currency table. Alphanumeric, 3 positions; optional.

Enter or verify the date range for which you wish to print the *Sales Journal by Currency Report*. The current date defaults. Select *Submit* to generate the report. A message indicates that the job has been submitted.

Printing the Held Orders by Pay Type Report (PHOP)

Purpose: Use the *Held Order by Pay Type Report* to obtain a list of the orders that are on hold for the specified payment type.

Print Held Orders by Pay Type Prompt Screen

How to display this screen: Enter *PHOP* in the Fast Path field at the top of any menu or select the Print Held Orders by Pay Type option from a menu.

Field	Description
Pay type	A code that represents the method by which the customer paid for the order. Pay type codes are defined in and validated against the Pay Types table. Enter the appropriate pay type code to submit the *Held Order by Pay Type Report*. The system checks the status of each open order that uses this pay type and includes only those orders in a *DH* (dollar hold) status in this report. Numeric, 2 positions; required.

Printing the Exchange Reason Report (PERR)

Purpose: Use this screen to generate the *Exchange Reason Report*, which you can use to review exchanges processed using various reason codes for a range of dates, including total units exchanged and dollar value. Your options in generating the report include:

- restricting the report to one exchange reason code, or including all codes
- listing the items that were exchanged

The report lists the total dollars exchanged based on the actual selling prices of the items returned for exchange. It does not indicate the prices of the replacement items.

Report based on order line history: When you generate the report, you need to specify a date range for selection. The report includes exchanges processed within the date range you enter, regardless of when the order was first created or when you ship the replacement item. The exchange date is determined by the Order Line History record for the exchange. You can review order line history at the *Display Order Line History Screen*.

> **Note:**
>
> If you use *Working with Return Authorizations (WRTA)*, it is possible to create, receive, and credit an exchange on different dates. In this case, the date range is based on the date you receive the return, because that is when the Order Line History record is created.

Print Exchange Reason Report Screen

How to display this screen: You can display this screen by entering *PERR* in the Fast path field at the top of a menu, or by selecting Print Exchange Reason Report from a menu.

Field	Description
Start date	Enter the first order date to include on the report. Must be on or before the End date, below. The report includes exchanges processed on that date or later, regardless of when the order was originally created. Based on the Date from the Order Line History table; see the *Display Order Line History Screen* for more information. **Note:** If you use *Working with Return Authorizations (WRTA)*, this is the date you receive the exchange, which might differ from the date you create or credit the return authorization for the exchange, or ship the replacement item. Numeric, in user date format; required.
End date	Enter the last order date to include on the report. Must be on or after the Start date. See the discussion of the Start date, above, for more information. Numeric, in user date format; required.
Exchange reason	Optionally, enter an exchange reason code to limit the report to that code. If you leave this field blank, all exchange reason codes are eligible for inclusion on the report. Exchange reason codes are defined in and validated against the Exchange Reason table; see *Establishing Exchange Reason Codes (WEXR)* for more information. Alphanumeric, 1 position; optional.
Include item	Optionally, select this flag to have the report list the items exchanged. • *Selected* = The report lists the items exchanged. • *Unselected* = The report does not list items.

Completing this screen: To generate the *Exchange Reason Report*:

- Complete the Start date and End date to specify the range of dates to include on the report.
- Optionally, select an Exchange reason or the Include item flag.
- Select *Print Report* to submit the EXCH_RSN job, which generates the report.

> **Note:**
>
> If there are no order lines that meet the selection criteria you enter, the job does not produce a report. No empty report is generated.

See the field descriptions above for more information.

Printing the Price Override Reason Report (PROR)

Purpose: Use this screen to generate the *Price Override Reason Report*, which you can use to review the price override reason codes used to discount items for a range of dates, and the total discount amounts and percentages applied. Your options in generating the report include:

- restricting the report to one price override reason code, or including all codes whose *Exclude from price override report* field is unselected
- listing the ID's of the users who applied the price overrides, listing the items whose prices were overridden, or listing both user ID's and items

Report based on order date, not price override date: When you generate the report, you need to select a date range for selection. The report includes orders that originated within the date range you enter, although the price override might not have been applied within that date range (for example, if you changed, added, or returned an order line at a later date).

Excluding price override reason codes: The system excludes any price override reason codes whose *Exclude from price override report* field is selected; for example, you may wish to exclude system-assigned price override reason codes, such as *Default Price Override Reason (B35)*, from the report; see *Default Price Override Reasons* for a list of system-assigned codes specified in system control values. You can also limit the report to a single code by completing the Price override reason field at the *Print Price Override Reason Report Screen*.

Discount amount and percentage based on item offer: The discount amounts and percentages listed on the report are determined by comparing the Item offer price from the Order Detail table with the actual price after applying the price override. If the *Override item offer price* flag for a price override reason code is selected, the system changes the Item offer price in the Order Detail table to be the same as the actual selling price; as a result, the discount amount and percentage in this case are both zero.

The report does not list any discounts that were not applied using a price override reason code.

In this topic:

1. *Identifying the User who Applied the Price Override*
2. *Print Price Override Reason Report Screen*

Identifying the User who Applied the Price Override

To identify the user who applied the price override, the system checks:

1. Order Line History? If there is no Order Line History record for the order line, this indicates that the price override was applied at initial order creation, so use the User ID on the Order Header. Otherwise, if there are any Order Line History records:

2. D (Discount) Order Line History? If there is an Order Line History record indicating that a discount was applied after shipment, use the User ID for that record; otherwise,

3. W (Price override) Order Transaction History message? If there is one or more Order Transaction History messages indicating a price override for the order line (for example, `User price override - Order line 2)`, use the User ID associated with the *first* Order Transaction History message.

Example: User EJOHNSON changes the price of an order line using price override reason code Z. Later that day, user HBROWN changes the price again, using price override reason W. The report lists the current reason code of W and the first user ID of EJOHNSON.

> **Note:**
>
> - The system writes a price override Order Transaction History message whenever a user makes any change to an order in order maintenance if there is already a price override reason applied to an order line.
> - The line number specified in the Order Transaction History message indicates the order line sequence number, and this is the number used to identify the order line for the price override. This sequence number is typically the same as the order line number, but might differ depending on updates made to the order.

Otherwise, if there is no Order Transaction History message for a price override,

4. A (Add) Order Line History but no subsequent changes? If there is an Order Line History record indicating that the order line was added after initial order creation, use that User ID; otherwise,

5. G (Change) Order Line History? If there are any *Change* Order Line History records indicating that the order line was changed after creation, use that User ID.

Print Price Override Reason Report Screen

How to display this screen: Enter *PROR* in the Fast path field at the top of any menu, or select Print Price Override Reason Report from a menu.

Field	Description
Start date	Enter the first order date to include on the report. Must be on or before the End date, below. The report includes orders that were originally created on that date or later, regardless of when the price override was applied. Based on the Order date from the Order Header. Numeric, in user date format; required.
End date	Enter the last order date to include on the report. The report includes orders that were originally created on that date or earlier, regardless of when the price override was applied. Based on the Order date from the Order Header. Numeric, in user date format; required.

Field	Description
Price override reason	Optionally, enter a price override reason code to limit the report to that code. An error message displays if you enter a price override reason code whose *Exclude from price override report* field is selected: `Reason is currently flagged to be excluded from reports - select another.` If you leave this field blank, all price override reason codes whose *Exclude from price override report* field is unselected are eligible for inclusion on the report. Price override reason codes are defined in and validated against the Price Override Reason table; see *Establishing Price Override Reason Codes (WPOR)* for more information. Alphanumeric, 1 position; optional.
Include users	Optionally, select this flag to have the report list the users who applied price overrides. • *Selected* = The report lists users who applied price overrides if the report includes all price overrides, there is a summary for each user. • *Unselected* = The report does not list users.
Include items	Optionally, select this flag to have the report list the item that received the price override. • *Selected* = The report lists the items that received price overrides. • *Unselected* = The report does not list items.

Completing this screen: To generate the *Price Override Reason Report*:

- Complete the Start date and End date to specify the range of original order dates to include on the report.
- Optionally, select a Price override reason, or the Include users or Include items flags.
- Select *Print Report* to submit the PRC_OVR job, which generates the report.

> **Note:**
>
> If there are no order lines that meet the selection criteria you enter, the job does not produce a report. No empty report is generated.

See the field descriptions above for more information.

Printing the Return Reason Report (PRRR)

Purpose: Use this screen to generate the *Return Reason Report*, which you can use to review returns processed using various reason codes for a range of dates, including total units returned and dollar value. Your options in generating the report include:

- restricting the report to one return reason code, or including all codes
- listing the items that were returned

Report based on order line history: When you generate the report, you need to specify a date range for selection. The report includes returns processed within the date range you enter, regardless of when the order was first created. The return date is determined by the Order Line History record for the return. You can review order line history at the *Display Order Line History Screen*.

> **Note:**
>
> If you use *Working with Return Authorizations (WRTA)*, it is possible to create, receive, and credit a return on different dates. In this case, the date range is based on the date you receive the return, because that is when the Order Line History record is created.

Print Return Reason Report Screen

How to display this screen: You can display this screen by entering *PRRR* in the Fast path field at the top of a menu, or by selecting Print Return Reason Report from a menu.

Field	Description
Start date	Enter the first order date to include on the report. Must be on or before the End date, below. The report includes returns processed on that date or later, regardless of when the order was originally created. Based on the Date from the Order Line History table; see the *Display Order Line History Screen* for more information. **Note:** If you use *Working with Return Authorizations (WRTA)*, this is the date you receive the return, which might differ from the date you create or credit the return authorization. Numeric, in user date format; required.
End date	Enter the last order date to include on the report. Must be on or after the Start date. See the discussion of the Start date, above, for more information. Numeric, in user date format; required.
Return reason	Optionally, enter a return reason code to limit the report to that code. If you leave this field blank, all return reason codes are eligible for inclusion on the report. Return reason codes are defined in and validated against the Return Reason table; see *Establishing Return Reason Codes (WRTR)* for more information. Alphanumeric, 1 position; optional.
Include item	Optionally, select this flag to have the report list the items that were returned. • *Selected* = The report lists the items returned. • *Unselected* = The report does not list items.

Completing this screen: To generate the *Return Reason Report*:

- Complete the Start date and End date to specify the range of dates to include on the report.
- Optionally, select a Return reason or the Include item flag.
- Select *Print Report* to submit the RET_RSN job, which generates the report.

> **Note:**
>
> If there are no order lines that meet the selection criteria you enter, the job does not produce a report. No empty report is generated.

See the field descriptions above for more information.

Displaying Open Orders by Item (DOOI)

Purpose: Use this on-line inquiry to identify orders that contain a specific item and to evaluate item statistics such as quantities ordered and reserved for that item.

You can also use this option to advance to standard Order Inquiry for a specific order, or to find out about pending purchase orders for a backordered item.

Quotes: This menu option also allows you to review item statistics on quotes; see *Entering Pre-Order Quotes*.

In this topic:

- *Open Orders by Item Screen (Selecting an Item for Review)*
- *Display Open Orders by Item Screen*
- *Display Open Purchase Orders Screen*

Open Orders by Item Screen (Selecting an Item for Review)

Use this screen to select the item you would like to research for open orders or purchase order information.

How to display this screen: Enter *DOOI* in the Fast path field or select this option from a menu.

> **Note:**
>
> You must enter complete and accurate information in both the Item and the SKU fields if applicable.

Field	Description
Item	Represents a unit of inventory. Alphanumeric, 12 positions; required.
SKU (Stock keeping unit; an unlabeled field to the right of the item number)	The style of the item, such as its color and size. Alphanumeric, three 4-position fields; required for any item with a SKU.

Display Open Orders by Item Screen

Use this screen to evaluate open orders for a specific item by quantity, age, and reason for backorder. You can also advance from this screen to standard Order Inquiry for a specific order or display open purchase orders for the item. **How to display this screen:** Enter a complete item code and SKU, if any, at the *Display Open Orders by Item Screen*.

Field	Description
Description (Unlabeled field to the right of the SKU field)	Text that describes the item. Alphanumeric, 120 positions; display-only
Order #	A unique number that the system assigns each order. Numeric, 7 positions; display-only.
St # (Ship To Number)	The number of the shipping address for the order. The system assigns a ship to suffix for each shipping address on an order. Numeric, 3 positions; display-only.
Ln # (Line number)	The item's order detail line number. Numeric, 3 positions; display-only.
Days old	The age of the order in days. Numeric, 5 positions; display-only
Quantity	Three status fields for the order detail line. These fields are: **Ordered** The quantity of the item on the order line. Numeric, 7 positions; display-only. **Reserved** The total reserved quantity of the item on the order line. Numeric, 7 positions; display-only. **Shipped** The total quantity of the item on the order line that has shipped to date. Numeric, 7 positions; display-only.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Rsn cde (Reason code)</td><td>Represents the reason the item is on backorder.
Valid values are:
blank = Order detail line is not backordered.
D = Item is a drop ship item that is not kept in your inventory, and will be sent to the customer directly from your vendor.
F = Item is a future order, as determined by the order's arrival date.
The system will not “tie-up” inventory that can be matched to current orders if the order will not ship for a period of time. The system uses the following calculation to identify future orders:
<code>Arrival date - Reservation lead days = Date</code>
The system will not reserve inventory if the system-calculated date is greater than today's date.
Normally, the Evaluate Future Orders program runs each evening during a periodic process to evaluate each order detail line identified as a “future” order. The system reruns the arrival date calculation and reserves inventory if the system-calculated date is less than or equal to today's date.
I = No Item/Warehouse record or no allocate; you have not defined a warehouse for this item or the warehouse you have assigned to this item is a non-allocatable warehouse.
W = No warehouse specified; you have not identified the warehouse from which you want to reserve the inventory.
N = Non-allocatable warehouse; inventory cannot be shipped from this warehouse.
O = Not enough inventory available in the warehouse to fulfill the entire order quantity.
S = Not selected batch reservation; you are using Batch Reservation (as opposed to Immediate Reservation, which reserves inventory during Order Entry) and you have not run the Batch Reservation program.</td></tr>
</table>

Field	Description
	• *B* = Reservation bypassed; the customer is excluded from normal reservations (Immediate or Batch Reservation) based on the setting of the Hold/Bypass/Fraud field. You must reserve inventory on a selective basis, using the Interactive Reservation program to reserve or unreserve inventory. Typically, customers who buy in large quantities are set up to bypass reservation so that they do not deplete your available stock when they place their orders. *Note:* If the *Use OROB for Fulfillment Assignment (M31)* system control value is selected, the system uses the Bypass reservation flag to send items to Order Orchestration for fulfillment assignment. • *L* = SKU Reserve limit exceeded. The customer has ordered a quantity equal to or greater than the item's Reserve quantity. Any order quantity above this value will not be reserved by the Immediate or Batch Reservation program and must be reserved selectively through the Interactive Reservation program. You may define a Reserve quantity limit for items that you carry in limited quantities or for items that are in great demand. • *U* = Interactive unreserve; an order detail line can be unreserved when you upload an inventory transaction through the *Generic Inventory Transaction Upload*, or through *Reprinting and Voiding Pick Slips (WVRP or WSVP)*. For more information, see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Alphanumeric, 1 position; display-only.
Description	Text that explains the meaning of the backorder reason code. Alphanumeric, 25 positions; display-only

Screen Option	Procedure
Display an order	Select *Display* for an order to advance to *Order Inquiry Header Screen* or the *Order Inquiry Detail Screen*, depending on the setting of the *Default Version for Order Inquiry (C34)* system control value.
Display open purchase orders for an item	Select *Display Open POs* to advance to the *Display Open Purchase Orders Screen*.

Display Open Purchase Orders Screen

Use this screen to obtain information about the unreceived or partially received purchase orders for an item. This screen includes the purchase order numbers, vendors, quantities and expected delivery dates for the item.

How to display this screen: Select *Display Open POs* at the *Display Open Orders by Item Screen*.

Field	Description
Whs (Warehouse)	The warehouse to which the item will be delivered. Numeric, 3 positions; display-only.

Field	Description
PO#	The number of the purchase order on which the item was ordered from the vendor. Numeric, 7 positions; display-only
Ln# (Line number)	The line number of item on the purchase order. Numeric, 3 positions; display-only
Vendor #	A code to identify the supplier of the item. Vendor codes are defined in and validated against the Vendor table. See Working with Vendors (WVEN). Numeric, 7 positions; display-only.
Name	The name of the vendor associated with the vendor number. **Note:** This field is blank if the *Vendor Name Display (D41)* system control value is *unselected*. Alphanumeric, 30 positions; display-only.
Qty due (Quantity due)	The number of units of the item expected in the shipment. Numeric, 7 positions; display-only.
Date	The date when the shipment of the item is expected. Numeric, 6 positions (in user date format); display-only.

Display Held Order Summary (DHOS)

Purpose: Use this function to review the total held number of orders and unbilled dollar totals for each order hold reason code.

Update summary table: The Held Order Summary table stores held order totals. You must submit a batch program to update this table with current totals. The totals that display on the Held Order Summary screen are only as current as the last time you ran this batch update.

Quotes: The # Orders and Dollars totals in this menu option does not include quotes that are on hold.

Modern View option: See the Modern View online help for information on the **Held Order Summary** page available in Modern View. Authority to the Held Order Summary page in Modern View is also controlled by the DHOS fast path.

Held Order Summary Screen

How to display this screen: Enter *DHOS* in the Fast path field at the top of any menu, or select Display Held Order Summary from a menu.

> **Note:**
>
> Each field on this screen is blank if you have not yet submitted the batch update to the Held Order Summary table.

Field	Description
Date last updated	The date and time when you most recently updated the Held Order Summary table. The totals provided for each hold reason code are current as of this date and time. Date: numeric, 6 positions (in user date format); display-only. Time: numeric, 6 positions (HH:MM:SS format); display-only.
Hold reason	The reason code that identifies why the order is held. Hold reason codes are defined in and validated against the Order Hold Reason table; see *Establishing Order Hold Reason Codes (WOHR)*. Alphanumeric, 2 positions; optional.
System hold	Indicates whether the orders were held automatically by the system, or a user put the orders on hold. Valid values are: • *selected* = The system put these orders on hold automatically. • *unselected* = Operators put these orders on hold. If your operators use a code that the system also uses automatically, there will be two totals for the hold reason: one for all system-assigned holds, and one for non-system-assigned (that is, user) holds. See *Introducing Order Hold Reason Codes*.
Description	The description of the order hold reason code. This field is blank for an order hold reason code if the system has assigned it to orders automatically, but you have not built the reason code in the Order Hold Reason Code table. Alphanumeric, 50 positions; display-only.
# orders	The total number of orders on hold with this hold reason code. Each held order increases this total by one, regardless of the number of recipients. Numeric, 8 positions; display-only.
Dollars	The total value of orders on hold with this hold reason code. This total includes merchandise, freight, tax, handling, additional charges, and any other charges (such as additional freight and duty) that make up the order total). **Note:** If you process orders in multiple currencies (the *Multi Currency by Offer (E03)* system control value is *selected*), the order total will be converted into your local currency. Numeric, 20 positions with a 2-place decimal; display-only.

Screen Option	Procedure
Review orders held for a particular hold reason code	Select *Disp Orders* for a hold reason code to advance to the Release Held Orders by User Hold Screen (if you select a user hold) or the Release Held Orders by System Hold Screen (if you select a system hold). See Selecting Held Orders (ERHO).
Submit the batch update to the Held Order Summary table	Select *Submit Update* to submit the *HLDORD_SUM* job, which updates the table with current held order totals.

Ship Via/Item Inquiry (SVII)

Purpose: The Ship Via/Item Inquiry menu option allows you to review how many shippable orders you currently have for a shipper, broken out by item. You might use this information to determine whether a bulk mailing may be appropriate for certain items.

Batch job: You must run a batch job to collect information on the current number of available order lines for each item/ship via combination in your company before you can review or print the information. You can run this batch job through the Ship Via/ Item Inquiry menu option, or by adding the periodic function SUMVIA to your periodic processing, using the program name OER1024.

Summary tables: The batch job populates the Ship Via/Item Summary Header (OESVIH) and Ship Via/Item Summary Detail (OESVID) tables. For a brief period during this process, you will be locked out of the Ship Via/Item Inquiry menu option while the system updates the summary information. If someone is already using the inquiry menu option when the system is ready to complete the batch job and update the summary tables, the batch job will go into a “delay” status, checking every 15 seconds to see if the user has exited the inquiry screens so that the update can be processed.

Review summary information: Use the Ship Via/Item Inquiry menu option to review the total open orders, shippable units, and oldest arrival dates for each item with a particular ship via assigned. An additional screen, where you can review the number of orders and units for each arrival date, is also available.

Reporting: You can print a report listing all shippable items by ship via code, or the items assigned to a particular ship via code only.

Which order lines are included? Ship Via/Item Inquiry and the related reports include any order line quantity that is reserved and unprinted. Both open and held order lines are included. The system uses the ship via code on the order header, unless there is a ship via override for the order line.

In this topic:

- *First Inquiry by Ship Via/Item Screen*
- *Second Inquiry by Ship Via/Item Screen*
- *Third Inquiry by Ship Via/Item Screen*
  - *Ship Via/Item Header Report*
  - *Ship Via/Item Detail Report*

First Inquiry by Ship Via/Item Screen

Purpose: Use this screen to:

- populate the Ship Via/Item Summary tables with up-to-date information
- advance to the *Second Inquiry by Ship Via/Item Screen* so you can review shippable items for a particular ship via
- generate the *Ship Via/Item Header Report* for all ship via codes in your company.

See *Ship Via/Item Inquiry (SVII)*.

How to display this screen: Enter SVII in the Fast path field at the top of any menu or select Ship Via/Item Inquiry from a menu.

Field	Description
Ship via	A code to identify a shipper who delivers merchandise for you to your customers. Enter a valid ship via code to advance to the *Second Inquiry by Ship Via/Item Screen*. Ship via codes are defined in and validated against the Ship Via table; see *Working with Ship Via Codes (WVIA)*. Numeric, 2 positions; required to advance to the second Inquiry by Ship Via/Item screen.
Last update (Last update information)	The date and time when the Ship Via/Item Summary tables were last updated, and the user ID of the person who generated the batch update. If these fields are blank, the batch job to populate the summary tables has never been run in your company. Date: numeric, 6 positions (in user date format); display-only. Time: numeric, 6 positions (HH:MM:SS format); display-only.

Summary table update: If the UPDSVITM batch job to update the summary tables is running, you will not be unable to advance to the *Second Inquiry by Ship Via/Item Screen* or print the *Ship Via/Item Header Report* during the time it takes to copy the updated information into the summary tables. Instead, an error message indicates:

The summary files are being updated and cannot be viewed or printed. When the file update is complete, you will be able to advance to the second screen or print a summary report.

Screen Option	Procedure
Update the Ship Via/Item Summary tables	Select *Update Summary File* to generate the UPDSVITM batch job, which populates the Ship Via/Item Summary Header and Detail tables with up-to-date information.
Print a list	Select *Print List (all ship via)* to print the *Ship Via/Item Header Report*.

Second Inquiry by Ship Via/Item Screen

Purpose: Use this screen to review the total number of shippable orders and units, and the oldest order arrival date, for all items assigned to a particular ship via.

How to display this screen: Complete the Ship via field at the *First Inquiry by Ship Via/Item Screen*.

Field	Description
Ship via	The ship via code you entered at the *First Inquiry by Ship Via/Item Screen*. The ship via description appears to the right. Ship via: numeric, 2 positions; display-only. Ship via description: alphanumeric, 30 positions; display-only.
Item	A code representing the unit of inventory that you sell. The items that display are either on orders with the selected ship via assigned at the header level, or have a ship via override for this particular item on the order. Alphanumeric, 12 positions; optional.
SKU	The item's unique characteristics, such as color or size. The labels that appear above the SKU field(s) are defined in the *Split SKU Values (B32)* system control values. Alphanumeric, three 4-position fields; optional.
Total orders	The total number of orders containing reserved, unprinted units of this item or SKU that are assigned to the ship via code you selected at the *First Inquiry by Ship Via/Item Screen*. Numeric, 5 positions; optional.
Total units	The total number of reserved, unprinted units of this item or SKU that are assigned to the ship via code you selected at the *First Inquiry by Ship Via/Item Screen*. Numeric, 7 positions; optional.
Oldest arrival (Oldest arrival date)	The earliest arrival date for all shippable orders of the item or SKU. The arrival date is when the customer wants to receive this item. The current date defaults in order entry; however, you can override the default and enter a future date. The system performs a calculation that projects the total processing and shipping time to determine when it will need to reserve the items and make them available for pick slip preparation. See *Working with Items on the Order*. Numeric, 6 positions (in user date format); optional.
Description (Unlabeled field below the item code field)	The description of the item. Alphanumeric, 120 positions; optional.

Screen Option	Procedures
Display order totals	Select *Display Totals* for an item or SKU to advance to the *Third Inquiry by Ship Via/Item Screen*.
Print a report	Select *Print List* to print the *Ship Via/Item Header Report*.

Third Inquiry by Ship Via/Item Screen

Purpose: Use this screen to review the total shippable orders and units for an item or SKU/ship via combination, broken out by arrival date.

How to display this screen: Select *Display Totals* for an item or SKU at the *Second Inquiry by Ship Via/Item Screen*.

Field	Description
Ship via	The ship via code you entered at the first Inquiry by Ship Via/Item screen. The ship via description appears to the right. Ship via: numeric, 2 positions; display-only. Ship via description: alphanumeric, 30 positions; display-only.
Item	The item you selected at the *Second Inquiry by Ship Via/Item Screen*. Alphanumeric, 12 positions; display-only.
SKU	The item's unique characteristics, such as color or size. Alphanumeric, three 4-position fields; display-only.
Item description	The description of the item. Alphanumeric, 120 positions; display-only.
Arrival date	The date when the customer wants to receive this item. The current date defaults in order entry; however, you can override the default and enter a future date. The system performs a calculation that projects the total processing and shipping time to determine when it will need to reserve the items and make them available for pick slip preparation. See *Working with Items on the Order*. Numeric, 6 positions (in user date format); optional.
Total orders	The total number of orders with the arrival date indicated. An order may be counted more than once if there is an override arrival date for one or more of the same order lines for the selected item. Numeric, 5 positions; optional.
Total units	The total number of units with the arrival date indicated. Numeric, 7 positions; optional.

Screen Option	Procedure
Print a report	Select *Print List* to print the *Ship Via/Item Detail Report*.

Printing Backorder Reports by Descending Dollars (PBOD)

Purpose: Use this screen to define the selection criteria you wish to use to print one of the Backorder Reports by Descending Dollars. These reports print the total number of orders with at least one order detail line on backorder, based on the selection criteria you defined. You can use these reports to determine the total value of backorders in each entity, division, offer, or warehouse.

Quotes: These reports do not include backorders on quotes; see *Entering Pre-Order Quotes*.

Backorder Reports by Descending Dollars:

- *Backorder Report by Descending Dollars by Entity/Warehouse* (sorts in entity/warehouse/ item/descending dollar sequence and displays backordered order detail lines for each entity).
- *Backorder Report by Descending Dollars by Division/Warehouse* (sorts in division/ warehouse/item/descending dollar sequence and displays backordered order detail lines for each division).

- *Backorder Report by Descending Dollars by Offer/Warehouse* (sorts in offer/warehouse/item/descending dollar sequence and displays backordered order detail lines for each offer).
- *Backorder Report by Descending Dollars by Warehouse* (sorts in warehouse/item/descending dollar sequence and displays backordered order detail lines for each warehouse).

Backorder Report by Descending Dollars Screen

How to display this screen: Enter *PBOD* in the Fast path field at the top of any menu or select Print B/O Reports by Descending Dollars from a menu.

Field	Description
Select offer for pricing	The code for the offer you wish to use to determine the selling price of an item on this report. The last offer entered defaults. Offer codes are validated against the Offer table. See *Working with Offers (WOFR)*. Alphanumeric, 3 positions; required.
By entity/whse	Indicates if you wish to print the Backorder Report by Descending Dollars By Entity/Warehouse. Valid values are: • *YES* = Print the *Backorder Report by Descending Dollars by Entity/Warehouse*. • *NO* = Do not print the Backorder Report by Descending Dollars by Entity/Warehouse. The last value entered defaults.
Entity (unlabeled field to the right of the	A code for the entity for which you wish to generate the Backorder Report by Descending Dollars By Entity/Warehouse. Enter an entity code in this field if you wish to only include backorder information associated with this entity. Leave this field blank if you wish to include backorder information for all entities. The last entity entered, if any, defaults. Entity codes are validated against the Entity table. Numeric, 3 positions; optional.
By division/whse	Indicates if you wish to print the Backorder Report by Descending Dollars by Division/Warehouse. Valid values are: • *YES* = Print the *Backorder Report by Descending Dollars by Division/Warehouse*. • *NO* = Do not print the Backorder Report by Descending Dollars by Division/Warehouse. The last selected setting defaults.

Field	Description
Division (unlabeled field to the right of the	A code for the division for which you wish to generate the Backorder Report by Descending Dollars by Division/ Warehouse. Enter a division code in this field if you wish to only include backorder information associated with this division. Leave this field blank if you wish to include backorder information for all divisions. The last division entered, if any, defaults. Division codes are validated against the Division table. Alphanumeric, 2 positions; optional.
By offer/whse	Indicates if you wish to print the Backorder Report by Descending Dollars by Offer/Warehouse. Valid values are: • *YES* = Print the *Backorder Report by Descending Dollars by Offer/Warehouse*. • *NO* = Do not print the Backorder Report by Descending Dollars by Offer/Warehouse. The last value entered defaults.
Offer (unlabeled field to the right of the	A code for the offer for which you wish to generate the Backorder Report by Descending Dollars by Offer/Warehouse. Enter an offer code in this field if you wish to only include backorder information associated with this offer. Leave this field blank if you wish to include backorder information for all offers. The last offer entered, if any, defaults. Offer codes are validated against the Offer table. See *Working with Offers (WOFR)*. Alphanumeric, 3 positions; optional.
By warehouse	Indicates if you wish to print the Backorder Report by Descending Dollars by Warehouse. Valid values are: • *YES* = Print the *Backorder Report by Descending Dollars by Warehouse*. • *NO* = Do not print the Backorder Report by Descending Dollars by Warehouse. The last value entered defaults.
Warehouse (unlabeled field to the right of the	A code for the warehouse for which you wish to generate the Backorder Report by Descending Dollars by Warehouse. Enter a warehouse code in this field if you wish to only include backorder information associated with this warehouse. Leave this field blank if you wish to include backorder information for all warehouses. The last warehouse entered, if any, defaults. Warehouse codes are validated against the Warehouse table. See *Creating and Maintaining Warehouses (WWHS)*. Alphanumeric, 3 positions; optional.

Screen Option	Procedure
Generate the Backorder Report by Descending Dollars, based on the selection criteria you defined.	Select *Accept*.

Reviewing Operations Control Summary (FLSH)

Purpose: Use the Operations Control Summary screens to review order and merchandising summary information for a selected date; you can review the flow of orders from entry through shipment to determine the health of your business. This menu option provides a high-level overview of the fulfillment process, identifies potential bottlenecks or problem areas, and delivers an audit trail of order activity.

Quotes: This menu option does not include information on quotes; see *Entering Pre-Order Quotes*.

Modern View page: The **Operations Summary** page in Modern View displays much of the same totals as the *First Operations Control Summary Screen*, as well as average values for each type of activity and bar charts illustrating the percentages of units, orders, and merchandise value represented for each activity.

This Modern View page is also controlled by access to the FLSH menu option, and is available from the Modern View **Home** page.

See the Modern View online help for more information.

In this topic:

- *Defining Thresholds*
- *Updating Operations and Merchandising Summary Totals*
- *Display Operations Control Summary Screen*
- *First Operations Control Summary Screen*
- *Second Operations Control Summary Screen*

You can review the number, units, and amount totals for the following information:

- orders:
  - entered
  - cancelled
  - soldout
  - shipped
  - returned
  - exchanged
  - held
  - suspended; also the number of suspended batches
  - open backordered
  - held backordered
  - open printed

  - held printed
  - open reserved
  - held reserved
- pending pick slips
- pending RA:
  - receipts
  - credits
- pending refunds
- backordered items
- purchase orders:
  - open
  - held
  - docked
  - open past due
  - held past due
  - docked past due
- inventory in:
  - suspense receipt
  - pending putaway
  - staging warehouse

Screen flow: The screen that opens when you first enter the Operations Control Summary menu option varies, depending on whether the Batch Order Control job was submitted for the day. See *Updating Operations and Merchandising Summary Totals* for more information on the Batch Order Control job.

- If the Batch Order Control job has not yet been submitted for the day, the *Display Operations Control Summary Screen* opens when you first enter the Operations Control Summary menu option.
- If the Batch Order Control job has already been submitted for the day, the *First Operations Control Summary Screen* opens when you first enter the Operations Control Summary menu option.

Defining Thresholds

You can define thresholds to monitor the numbers and/or amounts of operational and merchandising summary totals. The system compares the actual number and/or amount for the threshold against the threshold number and/or amount you defined; if the threshold you have defined is breached, the system generates the *Threshold Monitor Breach Email*.

Example: One of the system delivered thresholds is Backorders (*BO*). This threshold monitors the number of open orders and held orders that contain at least one unit on backorder and/or the merchandise amounts of backordered units on open or held orders. You can set this threshold to send an email to the warehouse supervisor when the number of open and held orders that contain at least one unit on backorder is greater than 100. Once the actual number of open and held orders containing a backordered item is 101, the system sends an email to the warehouse supervisor.

For more information: See *Working with Threshold Values (WTHR)* for more information on system delivered thresholds and how to define your own thresholds.

Updating Operations and Merchandising Summary Totals

Updating order activity totals for the selected date and accounting period: The system updates the information on the top part of the *First Operations Control Summary Screen* (order activity by date and accounting period) as changes occur in order activity and are processed through the Order Async and Billing Async. You can select *Refresh screen* to update the order activity totals displayed on the screen with any changes that may have occurred since you first entered the screen.

The system interactively updates the number, units, and amounts totals of the following order activity information:

orders:

- entered
- cancelled
- soldout
- shipped
- returned
- exchanged

Totals display for the selected date and accounting period.

- *Drop ship items* update the order activity totals as well as items that you ship from your warehouse.
- *Non-inventory items:* The setting of the *Demand Update for Non-Inventoried Items (E59)*system control value does not affect how the system calculates the order activity totals; non-inventory items update each total regardless of this setting.
- *Update demand for order maintenance:* The setting of the Update Demand for Order Maintenance Transactions (C72) system control value does not affect how the system calculates the order activity totals.
- *Excluded from totals:* Retail pickup and delivery orders that fulfill orders originating in Order Administration and submitted to Order Orchestration for assignment are excluded from these totals. These are orders whose *Alt ord* indicates an originating order number, and whose *Broker delivery type* is Delivery or Retail Pickup.
- *Currency:* Totals are displayed in the *Local Currency Code (A55)*.

Updating operations control summary totals: The Batch Order Control job (*ORD_CONTRL*) updates the operations and merchandising summary totals. You can review operations totals on the bottom part of the *First Operations Control Summary Screen* and the *Second Operations Control Summary Screen*.

The Batch Order Control job updates the number, units, and amounts totals of the following operations and merchandising information:

- orders:
  - open
  - held

  - suspended (also the number of suspended batches)
  - open backordered
  - held backordered
  - open printed
  - held printed
  - open reserved
  - held reserved
- pending pick slips
- pending RA:
  - receipts
  - credits
- pending refunds
- backordered items
- purchase orders:
  - open
  - held
  - docked
  - open past due
  - held past due
  - docked past due
- inventory in:
  - suspense receipt
  - pending putaway
  - staging warehouse

Submitting the Batch Order Control job: The system submits the Batch Order Control job when:

- you select *Update current totals* on the *First Operations Control Summary Screen*, *Second Operations Control Summary Screen*, or *Display Operations Control Summary Screen* in the Operations Control Summary (*FLSH*) menu option.
- you submit a periodic process that:
  - includes the Order Summary (*ORDSUM*) periodic function (program name *PFR0062*), OR
  - includes the Threshold (*THRESHD*) periodic function (program name *PFTHRESHMO*).

> **Note:**
>
> You can schedule a periodic process to run at a specified time; see *Executing Periodic Processes (EPRO)* for more information on defining a job schedule for a periodic process.

Batch Order Control processing: The Batch Order Control job:

- updates all of the fields in the Order Control Summary table for the current transaction date.
- generates the *Operations Control Report*, which displays the most recent operations and merchandising summary totals; the system generates the report only if you submit the Batch Order Control job from the Operations Control Summary menu option.
- updates the actual value fields and Last updated fields in the Threshold Values table; see *Updating Threshold Actual Values* for more information on the updates the batch order control job performs for threshold values.

> **Note:**
>
> The system does not update or use the Flash Report table to capture operations and merchandising summary information; instead, the system updates and uses the Order Control Summary table.

Display Operations Control Summary Screen

Updates to this screen: This screen displays operations control summary information for the dates when:

- you have executed order, cancellation, sold out, shipping, return or exchange transactions, or
- you have run the Batch Order Control job; see *Updating Operations and Merchandising Summary Totals*.

Order Control Report: When you update current totals by selecting *Update current totals*, or execute the periodic function *ORDSUM* (program name *PFR0062*), the system prints the *Operations Control Report* for the current (today's) date.

How to display this screen:

- select *Display All Days* at the *First Operations Control Summary Screen*, or
- If you have not yet run the Batch Order Control job or processed information through the Order Async or Billing Async for the current day:
- enter *FLSH* in the Fast path field or select this option from a menu.
- Select *Dsp Flash Rpt* at the *Streamlined Pick Slip Generation Screen*.

Field	Description
Date	The date when the displayed order activity took place. Numeric, 6 positions, in user date format; display-only.

Field	Description
The totals listed on the Display Operations Control Summary screen are accurate as of the time you refreshed the screen for the current date.	
Ordered	The number of orders and merchandise amounts for orders entered for the selected date and accounting period. **Note:** The order totals include order lines added to an existing order through order maintenance, regardless of the setting of the Update Demand for Order Maintenance Transactions (C72) system control value. **Orders** The number of orders entered, including: • the total number of ship-to addresses for orders with multiple ship-to's. For example, an order with two ship-to addresses updates the number of orders total by 2. • orders which include only sold out items or non-inventory items. This does not include batch orders that have not yet been accepted. This is the Orders entered number in the Order Control Summary table. The system adds the Orders entered number value for each transaction date in the accounting period to determine the number of orders entered for the accounting period. **Amount** The merchandise amount total of orders entered, including merchandise amount total of sold out items or non-inventory items. This does not include: • merchandise amounts for items returned during order entry. • merchandise amounts for batch orders that have not yet been accepted. This is the Orders entered dollars in the Order Control Summary table. The system totals the Orders entered dollars value for each transaction date in the accounting period to determine the merchandise amount total of orders entered for the accounting period. Number fields: numeric, 9 positions; display-only. **Amount fields: numeric, 20 positions with a 2-place decimal; display-only.**

Field	Description
Cancelled	The number of orders and merchandise amounts for orders cancelled for the selected date and accounting period. **Note:** These totals include orders, items, or merchandise amount only if the Reduce demand? flag for the cancel reason is unselected. **Orders** The number of orders cancelled (orders in *Cancelled* status; all order lines have been cancelled). This is the Orders cancelled number in the Order Control Summary table. The system totals the Orders cancelled number value for each transaction date in the accounting period to determine the total number of orders cancelled for the accounting period. **Amount** The merchandise amount total of cancelled items. This total updates when you cancel an entire order or one or more lines on an order. This is the Orders cancelled dollars in the Order Control Summary table. The system totals the Orders cancelled dollars value for each transaction date in the accounting period to determine the merchandise amount total of cancelled items for the accounting period. Number fields: numeric, 9 positions; display-only. Amount fields: numeric, 20 positions with a 2-place decimal; display-only.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Soldout</td><td>The number of orders and merchandise amounts for orders soldout for the selected date and accounting period.
The system considers an order line sold out if:
• you process soldout order lines in order entry, order maintenance, or the Processing Auto Soldout Cancellations (MASO) menu option.
• you cancel order lines with a cancel reason whose Reduce demand? flag is selected. However, the system updates only soldout orders and does not update soldout units, soldout amounts, cancelled orders, cancelled units, or cancelled amounts for these order lines.
Orders
The total number of soldout orders, including orders for which all order lines are sold out, or at least one order line is sold out and all other order lines have been cancelled using any cancel reason code.
This does not include order lines that are sold out if other order lines exist on the order that are not sold out or cancelled.
• This is the Orders soldout/closed number in the Order Control Summary table. The system totals the Orders soldout/closed number value for each transaction date in the accounting period to determine the total number of soldout orders for the accounting period.
Amount
The merchandise amount total of soldout items.
This is the Orders soldout dollars in the Order Control Summary table. The system totals the Orders soldout dollars value for each transaction date in the accounting period to determine the merchandise amount total of soldout items for the accounting period.
Number fields: numeric, 9 positions; display-only.
Amount fields: numeric, 20 positions with a 2-place decimal; display-only.</td></tr>
<tr><td>Shipped</td><td>The number of orders and merchandise amounts for orders shipped for the selected date and accounting period.
These totals are not decreased by returns or exchanges.
Orders
The total number of shipped orders.
This is the Orders shipped number in the Order Control Summary table. The setting of the Order Control Summary Shipment Update Method (I55) system control value determines how the system updates the shipped totals in the Order Control Summary table.
The system totals the # Orders shipped value for each transaction date in the accounting period to determine the total number of shipped orders for the accounting period.</td></tr>
</table>

Field	Description
	Amount The merchandise amount total of shipped items. This is the Orders shipped dollars in the Order Control Summary table. The system adds the Orders shipped dollars value for each transaction date in the accounting period to determine the merchandise amount total of shipped items for the accounting period. Number fields: numeric, 9 positions; display-only. Amount fields: numeric, 20 positions with a 2-place decimal; display-only.
Returned	The number of orders and merchandise amounts for orders returned for the selected date and accounting period. You can enter a return in: • order entry (via negative quantity ordered) • order maintenance, or • Work with Return Authorizations (these totals increase only when you process the credit) These totals include simple returns only, as opposed to exchanges. See *Returning and Exchanging Items in Order Maintenance*. **Orders** The total number of return transactions processed and credited, regardless of whether the returns are on the same order. For example, an order with 2 returned order lines processed separately updates this total by 2; however, if the same 2 returned order lines on a single order are processed in the same transaction, the total updates by 1. This is the Invoices credited number in the Order Control Summary table. The system totals the Invoices credited number value for each transaction date in the accounting period to determine the total number of return transactions processed and credited for the accounting period. **Amount** The merchandise amount total of returned items. This is the Invoices credited dollars in the Order Control Summary table. The system totals the Invoices credited dollars value for each transaction date in the accounting period to determine the merchandise amount total of returned items for the accounting period. Number fields: numeric, 9 positions; display-only. Amount fields: numeric, 20 positions with a 2-place decimal; display-only.

Screen Option	Procedure
Display operations control summary information for a selected date.	Select *Display* for a date to advance to the *First Operations Control Summary Screen*, which displays information for the selected date.

Screen Option	Procedure
Update totals for order recap information on the Operations Control Summary screen and print the Order Control Report for the current date.	Select *Update current totals* to submit the ORD_CONTRL job, which updates the information in the lower part of the *First Operations Control Summary Screen*. After the batch job is completed, you must exit the screen and re-display it to view the changes. This batch job also prints the *Operations Control Report* for the current date.

First Operations Control Summary Screen

Purpose: Use this screen to review:

- order activity information for the selected date and accounting period, such as the number, quantity, and amount totals of orders entered, cancelled, soldout, shipped, returned, and exchanged. The top half of the screen displays order activity information.
- order summary information as of the selected date, such as the number, quantity, and amount totals of orders open, held, suspended, open backordered, held backordered, open printed, held printed, open reserved, and held reserved. Operations summary information is on the lower half of the screen.

Updating totals: See *Updating Operations and Merchandising Summary Totals* for more information on how the system updates the totals on this screen.

> **Note:**
>
> If you advance to this screen for a date when you did not update the totals, the bottom half of the screen does not display any information.

Additional operations summary information: Select *OK* to advance to the *Second Operations Control Summary Screen*.

How to display this screen:

- Select a date at the *Display Operations Control Summary Screen* to display information for a selected date, or
- If the batch order control job has already run for today's date, or the Order Async is active and you have processed order information for the current day:
- enter *FLSH* in the Fast path field or select Display Operations Control Summary from a menu.
- select *Dsp Flash Rpt* at the *Streamlined Pick Slip Generation Screen*.

Field	Description
Information for selected date and accounting period:	

Field	Description
Date(Unlabeled field at top left of screen)	The current date, or the date you have selected at the *Display Operations Control Summary Screen*. The order activity information displayed below this date reflects total ongoing activity for the date. Numeric, 6 positions, in user date format; display-only.
Accounting period and year(Unlabeled field at top right of screen)	The accounting period which includes the date displayed in the Date field. The order activity information displayed below the month and year reflects total activity for the accounting period up to the selected date. Alphanumeric, 7 positions; display-only.
Ord (Orders)	The number of orders, number of units, and merchandise amounts for orders entered for the selected date and accounting period as of the time you refreshed the screen. **Note:** The order totals reflect initial order entry only. These totals do not include order lines added to an existing order through order maintenance, regardless of the setting of the Update Demand for Order Maintenance Transactions (C72) system control value. **Orders** The number of orders entered, including: • the total number of ship-to addresses for orders with multiple ship-to's. For example, an order with two ship-to addresses updates the number of orders total by 2. • orders which include only sold out items or non-inventory items. This total does not include: • Batch orders that have not yet been accepted. • An order that includes only order lines with negative quantities in order to process a return. This is the Orders entered number in the Order Control Summary table. The system adds the Orders entered number value for each transaction date in the accounting period to determine the number of orders entered for the accounting period. **Units** The number of units ordered, including: • the main set item as well as each component item. • units of sold out items or non-inventory items. This total does not include: • units returned by entering negative quantities in order entry. • units on batch orders that have not yet been accepted. This is the Quantity ordered in the Order Control Summary table. The system totals the Quantity ordered value for each transaction date in the accounting period to determine the number of units ordered for the accounting period.

Field	Description
	Amount The merchandise amount total of orders entered, including merchandise amount total of sold out items or non-inventory items. This total does not include: • merchandise amounts for items returned during order entry. • merchandise amounts for batch orders that have not yet been accepted. This is the Orders entered dollars in the Order Control Summary table. The system totals the Orders entered dollars value for each transaction date in the accounting period to determine the merchandise amount total of orders entered for the accounting period. Number fields: numeric, 9 positions; display-only. Amount fields: numeric, 20 positions with a 2-place decimal; display-only.
The following fields display totals for transactions processed on the selected date, or in the selected accounting period, regardless of whether the original order was processed on the selected date or in the selected accounting period.	

Field	Description
Can (Cancelled)	The number of orders, number of units, and merchandise amounts for orders cancelled for the selected date and accounting period as of the time you refreshed the screen. **Note:** These totals include orders, items, or merchandise amount only if the Reduce demand? flag for the cancel reason is unselected. **Orders** The number of orders cancelled (orders in *Cancelled* status; all order lines have been cancelled). This is the Orders cancelled number in the Order Control Summary table. The system adds the Orders cancelled number value for each transaction date in the accounting period to determine the total number of orders cancelled for the accounting period. **Units** The total number of units cancelled. This total updates when you cancel an entire order or one or more lines on an order. This is the Quantity cancelled in the Order Control Summary table. The system adds the Quantity cancelled value for each transaction date in the accounting period to determine the total number of units cancelled for the accounting period. **Amount** The merchandise amount total of cancelled items. This total updates when you cancel an entire order or one or more lines on an order. This is the Orders cancelled dollars in the Order Control Summary table. The system adds the Orders cancelled dollars value for each transaction date in the accounting period to determine the merchandise amount total of cancelled items for the accounting period. Number fields: numeric, 9 positions; display-only. Amount fields: numeric, 20 positions with a 2-place decimal; display-only.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>S/O (Sold out)</td><td>
The number of orders, number of units, and merchandise amounts for orders soldout for the selected date and accounting period as of the time you refreshed the screen.
The system considers an order line sold out if you:

Process soldout order lines in order entry, order maintenance, or the Processing Auto Soldout Cancellations (MASO) menu option.
Cancel all lines on the order with a cancel reason whose Reduce demand? flag is selected. However, the system updates only soldout orders and does not update soldout units, soldout amounts, canceled orders, canceled units, or canceled amounts for these order lines.

Orders
The total number of soldout orders, including orders for which all order lines are sold out, or at least one order line is sold out and all other order lines have been cancelled using any cancel reason code.
This does not include order lines that are sold out if other order lines exist on the order that are not sold out or cancelled.
This is the Orders soldout/closed number in the Order Control Summary table. The system adds the Orders soldout/closed number value for each transaction date in the accounting period to determine the total number of soldout orders for the accounting period.
Units
The total number of soldout units.
This is the Quantity soldout in the Order Control Summary table. The system adds the Quantity soldout value for each transaction date in the accounting period to determine the total number of soldout units for the accounting period.
Amount
The merchandise amount total of soldout items.
This is the Orders soldout dollars adds in the Order Control Summary table. The system adds the Orders soldout dollars value for each transaction date in the accounting period to determine the merchandise amount total of soldout items for the accounting period.
Number fields: numeric, 9 positions; display-only.
Amount fields: numeric, 20 positions with a 2-place decimal; display-only.
</td></tr>
</table>

Field	Description
Shp (Shipped)	The number of orders, number of units, and merchandise amounts for orders shipped for the selected date and accounting period as of the time you refreshed the screen. These totals are not decreased by returns or exchanges. **Orders** The total number of shipped orders. This is the # Orders shipped in the Order Control Summary table. The setting of the *Order Control Summary Shipment Update Method (I55)* system control value determines how the system updates the # Orders shipped field in the Order Control Summary table: • *ORDERS* = The system updates the # Orders shipped field when the Billing Async updates the status of an order to closed; see *ORDERS Order Control Summary Shipment Update Method* for more information on how the system updates by ORDERS. • *INVOICES* = The system updates the # Orders shipped field when the Billing Async creates an invoice for an order, excluding credit invoices; see *INVOICES Order Control Summary Shipment Update Method* for more information on how the system updates by INVOICES. • *PICKS* = The system updates the # Orders shipped field when the Billing Async processes a pick control number for an order; see *PICKS Order Control Summary Shipment Update Method* for more information on how the system updates by PICKS. The system totals the # Orders shipped value for each transaction date in the accounting period to determine the total number of shipped orders for the accounting period. **Units** The total number of shipped units, including: • shipped units confirmed; the system updates the units total as each unit is confirmed. • non-inventory items confirmed during billing. • For set items, the system updates the Quantity shipped by the number of components, plus the main set item. For example, if shipped main set set item A101 includes 2 components, the system updates the Quantity shipped by 3. This total does not include: • units for returns processed in order entry. • units on orders that are express billed if the *Order Control Summary Shipment Update Method (I55)* system control value is set to PICKS. • memberships or virtual stored value cards processed at pick slip generation if the *Order Control Summary Shipment Update Method (I55)*system control value is set to PICKS. This is the Quantity shipped in the Order Control Summary table. The system adds the Quantity shipped value for each transaction date in the accounting period to determine the total number of shipped units for the accounting period.

Field	Description
	Amount The merchandise amount total of shipped items, including: • shipments confirmed; the system updates the amount total as each unit is confirmed. • non-inventory items confirmed during billing. This total does not include: • amounts for returns processed in order entry. • amounts on orders that are expressed billed if the *Order Control Summary Shipment Update Method (I55)* system control value is set to PICKS. • amounts for memberships or virtual stored value cards processed at pick slip generation if the *Order Control Summary Shipment Update Method (I55)* system control value is set to PICKS. This is the Orders shipped dollars in the Order Control Summary table. The system totals the Orders shipped dollars value for each transaction date in the accounting period to determine the merchandise amount total of shipped items for the accounting period. Number fields: numeric, 9 positions; display-only. Amount fields: numeric, 20 positions with a 2-place decimal; display-only. **Units** The total number of returned units. This is the Quantity credited in the Order Control Summary table. The system totals the Quantity credited value for each transaction date in the accounting period to determine the total number of returned units for the accounting period. **Amount** The merchandise amount total of returned items. This is the Invoices credited dollars in the Order Control Summary table. The system totals the Invoices credited dollars value for each transaction date in the accounting period to determine the merchandise amount total of returned items for the accounting period. Number fields: numeric, 9 positions; display-only. Amount fields: numeric, 20 positions with a 2-place decimal; display-only.
Rtn (Returns)	The number of orders, number of units, and merchandise amounts for orders returned for the selected date and accounting period as of the time you refreshed the screen. You can enter a return in: • order entry (via negative quantity ordered) • order maintenance, or • Work with Return Authorizations (these totals increase only when you process the credit) These totals include simple returns only, as opposed to exchanges. See *Returning and Exchanging Items in Order Maintenance*. **Orders** The total number of return transactions processed and credited, regardless of whether the returns are on the same order. For example, an order with 2 returned order lines processed separately updates this total by 2; however, if the same 2 returned order lines on a single order are processed in the same transaction, the total updates by 1. This is the Invoices credited number in the Order Control Summary table. The system totals the Invoices credited number value for each transaction date in the accounting period to determine the total number of return transactions processed and credited for the accounting period.

Field	Description
Exc (Exchanges)	The number of orders, number of units, and merchandise amounts for items returned in exchange transactions for the selected date and accounting period as of the time you refreshed the screen. These totals include quantities and merchandise amount of the items returned in exchange transactions, *not* units and merchandise amount of items ordered in exchange. See *Returning and Exchanging Items in Order Maintenance*. You can enter an exchange in: • order maintenance • Work with Return Authorizations (these totals increase only when you process the credit) **Orders** The total number of exchange transactions processed, regardless of whether the exchanges are on the same order. For example, an order with 2 exchanged order lines processed separately updates this total by 2; however, if the same 2 exchanged order lines on a single order are processed in the same transaction, the total updates by 1. This is the Exchanges number in the Order Control Summary table. The system totals the Exchange number value for each transaction date in the accounting period to determine the total number of exchange transactions processed for the accounting period. **Units** The total number of units returned in exchange transactions. This is the Quantity exchanged in the Order Control Summary table. The system totals the Quantity exchanged value for each transaction date in the accounting period to determine the total number of units returned in exchange transactions for the accounting period. **Amount** The merchandise amount total of returned items in exchange transactions. This is the Exchanged dollars in the Order Control Summary table. The system totals the Exchanged dollars value for each transaction date in the accounting period to determine the merchandise amount total of returned items in exchanged transactions for the accounting period. Number fields: numeric, 9 positions; display-only. Amount fields: numeric, 20 positions with a 2-place decimal; display-only.
Information for order recap totals: Totals display only if you have run the Batch Order Control job; these totals are cumulative up to the date and time of the last update.	

Field	Description
Opn (Open)	Total number of open orders, open units, and total amount of open order lines. **Orders** The total number of open orders; this is the number of orders in an open status. This is the Open orders number in the Order Control Summary table for the most recent transaction date. **Units** The total number of open units; this is the total number of units on open order lines, including units on backorder and regardless if the units are printed or unprinted. This also includes units on order lines that are in a held status. This is the total of the Open backordered quantity, Open printed quantity, and Open unprinted quantity in the Order Control Summary table for the most recent transaction date. **Amount** The merchandise amount total of open order lines, including open order lines containing backordered units and regardless if the units are printed or unprinted. This also includes the merchandise amount for order lines that are in a held status. This is the total of the Open backordered dollars, Open printed dollars, and Open unprinted dollars in the Order Control Summary table for the most recent transaction date. Number fields: numeric, 9 positions; display-only. Amount fields: numeric, 20 positions with a 2-place decimal; display-only.
Hld (Held)	Total number of held orders, held units, and total amount of order lines on held orders. **Orders** The total number of held orders; this is the number of orders in a held status. This is the Held orders number in the Order Control Summary table for the most recent transaction date. **Units** The total number of held units; this is the total number of units on held orders, including units on backorder and regardless if the units are printed or unprinted. This does not include units on held order lines if the order is not held. This is the total of the Held backordered quantity, Held printed quantity, and Held Unprinted quantity in the Order Control Summary table for the most recent transaction date. **Amount** The merchandise amount total of held orders, including order lines containing backordered units and regardless if the units are printed or unprinted. This does not include merchandise amounts for held order lines if the order is not held. This is the total of the Held backordered dollars, Held printed dollars, and Held unprinted dollars in the Order Control Summary table for the most recent transaction date. Number fields: numeric, 9 positions; display-only. Amount fields: numeric, 20 positions with a 2-place decimal; display-only.

Field	Description
Sus (Suspended)	Total number of suspended orders, suspended units, and total amount of suspended orders, regardless if the order is batched. **Orders** The total number of suspended orders; this is the number of orders in a suspended status or error status as defined in the Order Header table. This is the Orders suspended number in the Order Control Summary table for the most recent transaction date. **Units** The total number of units on suspended orders, including orders in a suspended status and error status. The system uses this calculation over the Order Detail table to determine the suspended units: `quantity ordered - quantity cancelled - quantity shipped - quantity soldout = suspended units`. This is the Orders suspended quantity in the Order Control Summary table for the most recent transaction date. **Amount** The merchandise amount total of suspended orders, including orders in a suspended status and error status. This is the sum of the merchandise amounts for suspended and orders in error in the Order Ship To table. This is the Orders suspended dollars in the Order Control Summary table for the most recent transaction date. Number fields: numeric, 9 positions; display-only. Amount fields: numeric, 20 positions with a 2-place decimal; display-only.
OBO (Open/ backordered)	Total number of open backordered orders, open backordered units, and total merchandise amount of open backordered units. The system determines if an item is on backorder using this calculation: `open quantity on order line - reserved quantity on order line = backorder quantity`. The system uses this calculation to determine the open quantity: `order quantity - shipped quantity - cancelled quantity - soldout quantity = open quantity`. **Orders** The total number of open orders that contain at least one unit on backorder, including the total number of ship-to addresses for orders with multiple ship-to's. For example, an order with two ship-to addresses updates the number of orders total by 2. This is the Future use 1 number in the Order Control Summary table for the most recent transaction date. **Units** The total number of backordered units on open orders. This is the Quantity backordered in the Order Control Summary table for the most recent transaction date. **Amount** The total merchandise amounts of backordered units on open orders. This is the Open backordered dollars in the Order Control Summary table for the most recent transaction date. Number fields: numeric, 9 positions; display-only. Amount fields: numeric, 20 positions with a 2-place decimal; display-only.

Field	Description
HBO (Held/ backordered)	Total number of held backordered orders, held backordered units, and total merchandise amount of held backordered units. The system determines if an item is on backorder using this calculation: `open quantity on order line - reserved quantity on order line = backorder quantity`. The system uses this calculation to determine the open quantity: `order quantity - shipped quantity - cancelled quantity - soldout quantity = open quantity`. **Orders** The total number of held orders that contain at least one unit on backorder, including the total number of ship-to addresses for orders with multiple ship-to's. For example, an order with two ship-to addresses updates the number of orders total by 2. This is the Future use 2 number in the Order Control Summary table for the most recent transaction date. **Units** The total number of backordered units on held orders. This is the Quantity held backordered in the Order Control Summary table for the most recent transaction date. **Amount** The total merchandise amount of backordered units on held orders. This is the Held backordered dollars in the Order Control Summary table for the most recent transaction date. Number fields: numeric, 9 positions; display-only. Amount fields: numeric, 20 positions with a 2-place decimal; display-only.
Opn/Prt (Open/ Printed)	Total number of units on open orders for which pick slips have been printed and total merchandise amount of units on open orders for which pick slips have been printed. **Units** The total number of printed units on open orders. The total number of open printed units is the Open printed quantity in the Order Control Summary table for the most recent transaction date. **Amount** The total merchandise amount of printed units on open orders. This is the Open printed dollars in the Order Control Summary table for the most recent transaction date. Number fields: numeric, 9 positions; display-only. Amount fields: numeric, 20 positions with a 2-place decimal; display-only.
Hld/Prt (Held/ printed)	Total number of units on held orders for which pick slips have been printed and total merchandise amount of units on held orders for which pick slips have been printed. **Units** The total number of printed units on held orders. This is the Held printed quantity in the Order Control Summary table for the most recent transaction date. **Amount** The total merchandise amount of printed units on held orders. This is the Held printed dollars in the Order Control Summary table for the most recent transaction date. Number fields: numeric, 9 positions; display-only. Amount fields: numeric, 20 positions with a 2-place decimal; display-only.

Field	Description
Opn/Rsv (Open/ reserved)	Total number of units on open orders which are reserved and total merchandise amount of units on open orders which are reserved. **Units** The total number of reserved units on open orders. This is the Open unprinted quantity in the Order Control Summary table for the most recent transaction date. **Amount** The total merchandise amount of reserved units on open orders. This is the Open unprinted dollars in the Order Control Summary table for the most recent transaction date. Number fields: numeric, 9 positions; display-only. Amount fields: numeric, 20 positions with a 2-place decimal; display-only.
Hld/Rsv (Held/ reserved)	Total number of units on held orders which are reserved and total merchandise amount of units on held orders which are reserved. **Units** The total number of reserved units on held orders. This is the Held unprinted quantity in the Order Control Summary table. **Amount** The total merchandise amount of reserved units on held orders. This is the Held unprinted dollars in the Order Control Summary table. Number fields: numeric, 9 positions; display-only. Amount fields: numeric, 20 positions with a 2-place decimal; display-only.
General information	
Last updated on/at	The date and time when the Batch Order Control job was last run, updating the operations and merchandising totals. Date: numeric, 6 positions, in user date format; display-only. Time: numeric, 6 positions, HH:MM:SS format; display-only.
Suspended batches	The total number of order batches that are in a suspended status. The system determines the number of order batches in a suspended status by totaling the number of orders in the Order Batch table whose Batch suspended field is *selected*. This is the Batches suspended number in the Order Control Summary table. Numeric, 9 positions; display-only.

Screen Option	Procedure
Review operations summary information on the second Operations Control Summary screen.	Select *OK* to advance to the *Second Operations Control Summary Screen*.
Update the operation totals on the screen	Select *Refresh screen* to update the operations totals.
Review order summary information by date or select a date for which you want to view detailed order summary information	Select *Display all days* to advance to the *Display Operations Control Summary Screen*.

Screen Option	Procedure
Update current totals for open/ held order recap information and print the Order Control Report for the current date.	Select *Update current totals* to submit the batch job ORD_CONTRL, which will update the information in the lower part of the screen (Order Recap information). After the batch job is completed, you must select *Refresh screen* to view the changes. This batch job will also print the *Operations Control Report* for the current date. **Note:** This option is not available when you display this screen for dates other than the current date. If you try to use this option for past dates, the screen displays the following error message: `Update cannot be submitted for a prior date.`
Review merchandising summary information for the date you are currently reviewing	Select *Merchandising* to advance to the Merchandising Control Summary screen.

Second Operations Control Summary Screen

Purpose: Use this screen to review operations control summary information, such as the number, quantity, and amount total of pending pick slips, pending RA receipts, pending RA credits, and pending refunds.

Updating totals: See *Updating Operations and Merchandising Summary Totals* for more information on how the system updates the totals on this screen.

If you display this screen for a date when you did not update the totals, there is no information on this screen.

How to display this screen: Select *OK* at the *First Operations Control Summary Screen*.

Field	Description
Date (unlabeled field at the center top of the screen)	The current date, or the date you have selected at the *Display Operations Control Summary Screen*. The operations summary information displayed below this date reflects total ongoing activity for the date. Numeric, 6 positions, in user date format; display-only.

Field	Description
Totals display only if you have run the Batch Order Control job; these totals are cumulative up to the date and time of the last update.	
Pick slips	The number of pending pick slips, number of units on pending pick slips, and merchandise amounts for pending pick slips. Pending pick slips are pick slips that have been printed but not yet billed, not including pick slips voided, waiting for authorizations, or suspended. The system increases the pending pick slip number, units, and amounts for drop ship orders if the drop ship output defined for the vendor is drop ship pick slip; if the drop ship output defined for the vendor is drop ship purchase order or collaborative shipping, the system only increases the total units and total amounts pending and does not increase the total number pending. **Number** The total number of pick slips pending. This is the Pending picks number in the Order Control Summary table. **Units** The total number of units on pending pick slips. This is the total of the Open printed quantity and Held printed quantity in the Order Control Summary table for the most recent transaction date. **Amount** The merchandise amount total of items on pending pick slips. This is the total of the Open printed dollars and Held printed dollars in the Order Control Summary table. Number fields: numeric, 9 positions; display-only. Amount field: numeric, 20 positions with a 2-place decimal; display-only.
RA receipts	The number of pending return authorization receipts, number of units on pending return authorization receipts, and merchandise amounts for pending return authorization receipts. Pending return authorization receipts are return authorizations that have been entered, but not yet received. You can only enter a pending RA receipt using non-streamlined return authorizations (the *Use Streamlined Return Authorizations (F44)* system control value is *selected*. These totals include quantities and merchandise amount of the items returned in return transactions and items returned in exchange transactions, *not* units and merchandise amount of items ordered in exchange. See *Returning and Exchanging Items in Order Maintenance*.

Field	Description
	Number The total number of pending return authorization receipts, regardless of whether the returns are on the same order. For example, an order with 2 pending RA receipt order lines processed separately updates this total by 2; however, if the same 2 pending RA receipt order lines on a single order are processed in the same transaction, the total updates by 1. The system determines the number of pending RA receipts by totaling the number of RA header records whose date received is 0. This is the Pending RA receipt number in the Order Control Summary table. **Units** The total number of units on pending return authorization receipts. The system determines the number of units on pending RA receipts by looking at the RA detail records whose quantity returned is less than the quantity to return and totaling the unreceived quantity. This is the Pending RA receipt quantity in the Order Control Summary table. **Amount** The merchandise amount total of items on pending return authorization receipts. The system determines the merchandise amounts of items on pending RA receipts by multiplying the unreceived quantity by the order detail price. This is the Pending RA receipt dollars in the Order Control Summary table. Number fields: numeric, 9 positions; display-only. **Amount field: numeric, 20 positions with a 2-place decimal; display-only.**
RA credits	The number of pending return authorization credits, number of units on pending return authorization credits, and merchandise amounts for pending return authorization credits. Pending return authorization credits are return authorizations that have been received, but not yet credited. You can only enter a pending RA credit using non-streamlined return authorizations (the *Use Streamlined Return Authorizations (F44)* system control value is *selected*). These totals include quantities and merchandise amount of the items returned in return transactions and items returned in exchange transactions, *not* units and merchandise amount of items ordered in exchange. See Returning and Exchanging Items in Order Maintenance.

Field	Description
	Number The total number of pending return authorization credits, regardless of whether the returns are on the same order. For example, an order with 2 pending RA credit order lines processed separately updates this total by 2; however, if the same 2 pending RA credit order lines on a single order are processed in the same transaction, the total updates by 1. The system determines the number of pending RA credits by totaling the number of RA header records whose date received is greater than 0 and date credited is 0. This is the Pending RA credit number in the Order Control Summary table. **Units** The total number of units on pending return authorization credits. The system determines the number of units on pending RA credits by looking at the RA detail records whose quantity credited is less than the quantity to credit and totaling the uncredited quantity. This is the Pending RA credit quantity in the Order Control Summary table. **Amount** The merchandise amount total of items on pending return authorization credits. The system determines the merchandise amounts of items on pending RA credits by multiplying the uncredited quantity by the order detail price. This is the Pending RA credit dollars in the Order Control Summary table. Number fields: numeric, 9 positions; display-only. **Amount field: numeric, 20 positions with a 2-place decimal; display-only.**
Refunds	The number of pending refunds, number of units on pending refunds, and merchandise amounts for pending refunds. Pending refunds are refunds in an open or held status that have not yet been processed; these totals do not include refunds that are in a pending canceled, canceled, pending write off, write off, or processed status. **Number** The total number of unprocessed refunds. This is the Refunds pending number in the Order Control Summary table. **Amount** The merchandise amount total of items on unprocessed refunds. This is the Refunds pending dollars in the Order Control Summary table. Number field: numeric, 9 positions; display-only. Amount field: numeric, 20 positions with a 2-place decimal; display-only.
Last updated on/at	The date and time when the Batch Order Control job was last run, updating the operations and merchandising totals. Date: numeric, 6 positions, in user date format; display-only. Time: numeric, 6 positions, HH:MM:SS format; display-only.

Screen Option	Procedure
Review operations summary information on the first Operations Control Summary screen.	Press *Page Up* to advance to the First Operations Control Summary Screen.
Update the operation totals on the screen	Select *Update current totals*.
Review order summary information by date or select a date for which you want to view detailed order summary information	Select *Display all days* to advance to the Display Operations Control Summary Screen.
Update current totals for open/held order recap information and print the Order Control Report for the current date.	Select *Update current totals* to submit the batch job ORD_CONTRL, which will update the information in the lower part of the screen (Order Recap information). After the batch job is completed, you must select *Refresh screen* to view the changes. This batch job will also print the Operations Control Report for the current date. **Note:** This option is not available when you display this screen for dates other than the current date. If you try to use this option for past dates, the screen displays the following error message: `Update cannot be submitted for a prior date`.

Reviewing Pending Orders (DOSS)

Purpose: Use this option to review current totals of orders that require shipment or other processing or action, broken out by the type of action or processing required. The information displayed includes:

- order queue classification: quote, error, suspended, held, backordered, printed, pickup, or reserved
- for each queue:
  - total number of orders and total dollar value
  - oldest and newest order date

You can select an order queue to advance to a subsequent screen listing the individual orders in that queue and providing information about each order, such as merchandise total, source code, hold reason, and sold-to customer. At this screen, you can select an order for inquiry.

In this topic:

- *Assignment Hierarchy for Pending Order Queues*
- *Pending Order Summary Screen*
- *Pending Order Details Screen*

Assignment Hierarchy for Pending Order Queues

The system uses the following hierarchy to assign each order to a pending order queue:

1. If the Quote field for the order type on the order is *selected* and the order is not in error, assign to the Quote queue; otherwise,
2. If the order header status is Error, assign to the Error queue; otherwise,
3. If the order header status is Suspended, assign to the Suspended queue; otherwise,
4. If the order is a store pickup order, assign to the Pickup queue; otherwise,
5. If the order ship-to status is Held, or if any of the ship-tos on a multi-recipient order is Held, assign to the Held queue; otherwise,
6. If any of the order lines on any of the ship-tos is backordered, assign to the Backordered queue; otherwise,
7. If any of the order lines on any of the ship-tos is printed on a pick slip, assign to the Printed queue; otherwise,
8. Assign to the Reserved queue.

Considerations when determining queue assignment:

- Orders whose status is Canceled or Closed are not included in the pending orders screens.
- For non-quote orders, order lines are considered backordered if the reserved quantity is less than the quantity ordered - the quantity canceled - the quantity sold out - the quantity shipped.
- Brokered backorders are included in the Backordered queue.
- For non-quote orders, order lines for drop-ship items, non-inventory items, membership items, gift cards, and main set items are considered reserved, not backordered.
- Orders that include held order lines are not automatically assigned to the Held order queue. The system evaluates this status at the order ship-to level, not at the order line level.
- Order lines are considered printed if they are included on a regular pick slip, a drop ship pick slip, or a drop ship purchase order.
- For non-quote orders, the status of order lines controls the queue assignment even if the order line is “no charge.” For example, if all the items on an order are reserved except for a “no charge” item that is backordered, the order is assigned to the Backordered queue rather than the Reserved queue.
- Quote orders that are suspended are included in the Quote queue rather than the Suspended queue; however, quote orders that are in error are included in the Error queue. A quote order received through the order API might be in error if the Pay method required field is selected for the quote order type and there was no

payment method on the order, or if any other information in the CWOrderIn message was invalid.

Determining the order count: The Order count at the *Pending Order Summary Screen* is based on the order header for multi-recipient orders, not the individual order ship-tos. For example, an order with 3 recipients increases the Order count by 1, not 3.

Determining the order amount:

- The $ on orders total at the *Pending Order Summary Screen* and the Order amount at the *Pending Order Details Screen* include total merchandise value based on actual selling price only. The totals do not include tax, freight, additional freight, or additional charges, and do not reflect offer prices before applying discounts or price overrides.
- Only order lines whose status is open, held, error, or closed are included in the $ on orders total at the *Pending Order Summary Screen* or the Order amount at the *Pending Order Details Screen*. Canceled and soldout lines are not included in the total.
- The extended value of all eligible order lines (open, held, error, or closed) is included in the displayed total, even if the order line status does not correspond to the queue status. For example, if any lines on the order are backordered, the entire merchandise total for the order is included, even though some of the lines might be reserved or closed.
- Negative order line values (which can occur when you process a return by entering a negative quantity) are subtracted from the total order value.

Pending Order Summary Screen

Purpose: Use this screen to review the total pending orders broken out by queue assignment. See *Reviewing Pending Orders (DOSS)* for a discussion.

Reviewing Pending Orders (DOSS)
How to display this screen: Enter *DOSS* in the Fast path field at the top of any menu, or select Pending Orders from a menu.

Field	Description
Queue	The queue assignment, indicating the type of action you need to take to process the order. Each order is assigned to a queue as follows: • *Suspended* = the order header status is Suspended, and the order is not a quote (the Quote field for the order type is not selected) • *Error* = the order header status is Error • *Held* = the order ship-to status is Held; or, any of the ship-tos on a multi-recipient order is Held, and the order header is not in Error • *Backordered* = one or more of the order lines on any of the ship-tos is backordered, and the order is not eligible for the Error or Held queue • *Printed* = one or more of the order lines on any of the ship-tos is printed on a pick slip, and the order is not eligible for the Error, Held, or Backordered queue • *Reserved* = the order is not eligible for any of the other queues • *Quote* = the Quote field for the order type on the order is *selected* and the order header status is not Error • *Pickup* = the customer is picking up the order in a store location where the merchandise is currently available. See Store Pickup Orders for background. See Assignment Hierarchy for Pending Order Queues for an overview. **Note:** If there are no orders meeting the criteria for a particular queue, the screen does not display that queue. See Assignment Hierarchy for Pending Order Queues for a discussion. Click on a queue name to advance to the Pending Order Details Screen.
Oldest date	The oldest Order date of all orders in the queue. This is the Date displayed on the order header screen in standard order inquiry. Numeric, 6 positions (in user date format); display-only.
Newest date	The newest Order date of all orders in the queue. This is the Date displayed on the order header screen in standard order inquiry. Numeric, 6 positions (in user date format); display-only.
Order count	The total number of orders in the queue. Increased by *1* for a multi-recipient order. See Assignment Hierarchy for Pending Order Queues for a discussion of how orders are assigned to a particular queue. Numeric, no pre-defined maximum length; display-only.

Field	Description
$ on orders	The total merchandise dollar value of orders assigned to the queue. This total includes merchandise value based on actual selling price only, and does not include tax, freight, additional freight, or additional charges, and does not reflect offer prices before applying discounts or price overrides. Also, only order lines whose status is open, held, error, or closed are included in the total; canceled and soldout lines are not included. • The extended value of all eligible order lines (open, held, error, or closed) is included in the displayed total, even if the order line status does not correspond to the queue status. For example, if any lines on the order are backordered, the entire merchandise total for the order is included, even though some of the lines might be reserved or closed. • Negative order line values (which can occur when you process a return by entering a negative quantity) are subtracted from the total order value. Numeric, no pre-defined maximum length, with a 2-position decimal; display-only.

Options at this screen:

Option	Procedure
Review orders within a queue	Click the queue name to advance to the *Pending Order Details Screen*, where you can review the orders in that queue.
Change the order in which queues are sorted on the screen	Click a column heading to sort the queues by that column. For example, click Order count to sort the queues in ascending sequence by total order count. Once you have sorted by a column, you can click the column heading again to reverse the sort. For example, click Order count again to reverse the sort from ascending to descending sequence.

Pending Order Details Screen

Purpose: Use this screen to review the individual orders within a pending order queue.

How to display this screen: Select a queue at the *Pending Order Summary Screen*.

When you first advance to this screen, orders display in ascending order number sequence.

Maximum number of records to display: The system displays the first 500 records in the queue that meet your search criteria. The following message displays if there are more than 500 records to display:

The maximum number of records was exceeded. Please refine search criteria. Showing records 1-500.

You can use the Order # and Date fields on this screen to refine the pending order details you wish to review. In order to refine the records that display you must select *OK* after you enter your search criteria.

Field	Description
Queue	The queue selected at the *Pending Order Summary Screen*.
Order #	An order number assigned to the queue. See *Assignment Hierarchy for Pending Order Queues* for background. You can click the order number to advance to standard order inquiry for that order. Numeric, 8 positions; optional.
Date	The order date. This is the Date displayed on the order header screen in standard order inquiry. Numeric, 6 positions (in user date format); optional.
Customer #	The sold-to customer who placed the order. Numeric, 9 positions; display-only.
Rcp (recipient)	The number of shipping addresses on the order. Numeric, 3 positions; display-only.
Order type	The description of the order type, as set up through *Establishing Order Types (WOTY)*. Alphanumeric, 30 positions; display-only.
Order amount	The total merchandise dollar value of the order. This total includes merchandise value based on actual selling price only, and does not include tax, freight, additional freight, or additional charges, and does not reflect offer prices before applying discounts or price overrides. Also, only order lines whose status is open, held, error, or closed are included in the total; canceled and soldout lines are not included. • The extended value of all eligible order lines (open, held, error, or closed) is included in the displayed total, even if the order line status does not correspond to the queue status. For example, if any lines on the order are backordered, the entire merchandise total for the order is included, even though some of the lines might be reserved or closed. • Negative order line values (which can occur when you process a return by entering a negative quantity) are subtracted from the total order value. Numeric, no pre-defined maximum length, with a 2-position decimal; display-only.
Source code	The source code from the order header. Alphanumeric, 9 positions; display-only.
Hold reason	The hold reason code, if any, assigned to the order header. Hold reasons assigned to an order ship-to might differ from the reason code at the header. This field is used only when you are reviewing orders in the Held order queue. See *Introducing Order Hold Reason Codes* for an overview. Alphanumeric, 2 positions; display-only.
Ship via	The ship via code assigned to the order. If the order has more than one ship to, this is the ship via code for the order from the Order Ship To table with the lowest numeric number, regardless of the status of the ship to order. Numeric, 2 positions; display-only.

Scanning and display sequence options: Click a column name to sort the displayed orders in ascending or descending sequence by that field. For example, click the Hold reason column name once to display orders in alphanumeric sequence by hold reason code; click the Hold reason column name again to display orders in reverse alphanumeric sequence.

Current display sequence indicated: An arrow next to a column heading indicates that the orders are currently displayed in sequence based on that column.

For example, the upward-pointing arrow indicates that orders are displayed in ascending sequence by order value:

The downward-pointing arrow indicates that orders are displayed in descending sequence:

Combining display sequence with scan fields: You can also scan on the Date field to restrict the displayed orders by date. For example, if you enter a date and then click the Customer # column heading, the screen displays orders for that date or later in customer number sequence.

Retaining display sequence: When you change the display sequence for an order queue, then return to the *Pending Order Summary Screen* and select a different queue for review, the screen retains the display sequence. For example, you review held orders and click the Order amount field to display orders in ascending sequence by dollar value. If you then exit the screen and select reserved orders for review, the screen displays reserved orders in ascending sequence by dollar value.

> **Note:**
>
> Sorting by order number is not supported.

Options at this screen:

Option	Procedure
Select an order for inquiry	Click an order number to advance to standard order inquiry for that order. See *Order Inquiry* for a discussion.
Change the display sequence on the screen	See above for a discussion.
Refresh the list of orders	Select *Reset* to refresh the order information displayed on the screen and to clear the information in the Order # and Date scan fields.

Sales Summary (DSSS)

Purpose: Use the Sales Summary screen to view the number and dollar value of shipments processed:

- for the current day, week, and month
- broken out by order type and entity

Updated continuously: The totals displayed are based on the Invoice Ship To records created when you ship orders. When the BILL_ASYNC job is running, it creates these records as part of initially billing an order. These updates are not deferred based on the setting of the *Delay Billing Updates (K85)* system control value.

Modern View option: A **Sales Summary** page is also available in Modern View, including tiles at the top of the page, with totals are broken out by order type below, and bar charts illustrating the percentages of merchandise value billed for each order type. If your company supports fulfilling orders through integration with Order Orchestration, totals are broken out by delivery type as well, including store pickup, delivery, retail pickup, and ship-for-pickup. Orders that were not fulfilled through the Order Orchestration integration are listed as direct delivery. See the **Sales Summary** page in the Modern View online help for more information.

In this topic:

- *Calculations*
- *Sales Summary Screen*

Calculations

Which invoices are included? The totals displayed on this screen include Invoice Ship To records for regular (debit) invoices and their merchandise totals only. This screen does *not* include:

- Returns, credits, or discounts applied after shipment
- Freight, tax, handling, or other charges
- Any invoice with a merchandise total of $0.00

How is the invoice date determined? This screen organizes shipments based on the Invoice date from the Invoice Ship To record. This date is from the Start date from the BILL_ASYNC job. If the background jobs are running using a previous date because they are not stopped and restarted daily, then the invoices billed today are included under that previous date, not under *Today*.

How is the number of sales calculated? The total number of sales for a period, order type, or entity is from the total number of Invoice Ship To records billed. This total:

- Excludes (is not net of) credit invoices, such as an invoice created by processing a return. For example, if you process 1000 shipments, 50 returns, and 10 discount credits after shipment, the total displayed here is still 1000.
- Does not include any invoice with a merchandise total of $0.00.:

For more information: See *Consolidated Invoice (B49)* for a discussion on the factors that control how many invoices are generated for orders that include multiple shipments on the same day.

> **Important:**
>
> In Order Management System 21.0 or higher, or Order Administration, you cannot select the Consolidated Invoice system control value if it is not already selected. If the system control value is currently selected (set to Y) and you deselect it (change it to N or blank), you cannot then change it back to selected. The option to consolidate invoices will be removed at a later date.

How is the sales amount calculated? The total sales amount for a period, order type, or entity is from the total dollar value of merchandise billed for the period, based on actual selling price. This total:

- Excludes (is not net of) returns, credits, or discounts applied after shipment.
- Does not include freight, tax, handling, or other charges.
- Includes a two-position decimal.

Sales Summary Screen

How to display this screen: Enter *DSSS* in the Fast path field at the top of any menu, or select the Sales Summary option from a menu.

Field	Description
Current day, week, and month totals	The top portion of the screen displays totals for the current day, week, and month.
Period	Periods are: *Today* = The current date. *This week* = The current week runs from Monday through Sunday, and the totals displayed include all days so far for this period. **Note:** The calculation of totals for This week occurs regardless of whether a new month starts during the week. *Example:* Today is Sunday June 3. The totals displayed under This week include Monday May 28 through the current date. *This month* = The totals for the current month to date. **Note:** See the note above on how invoice date is determined.
Number	See the *Calculations* above for a discussion.
Amount	See the *Calculations* above for a discussion.
Order Type totals for today	The *Order Type* tab lists the current day’s total number of Invoice Ship To records and dollar amounts for each order type in your company, except for quote order types. **Note:** See the note above about how invoice date is determined.

Field	Description
Order type	The code identifying the order type. The description of the order type follows, separated by a hyphen. Order types are defined in and validated against the Order Type table. See *Establishing Order Types (WOTY)* for more information. Quote order types are not listed here, since it is not possible to bill merchandise for a quote. See *Entering Pre-Order Quotes* for background.
Number	See the *Calculations* above for a discussion.
Amount	See the *Calculations* above for a discussion.
Entity totals for today	The *Entity* tab lists the current day's total number of Invoice Ship To records and dollar amounts for each entity in your company. **Note:** See the note above on how invoice date is determined.
Entity	The code identifying a business entity within your company. The description of the entity follows, separated by a hyphen. Entities are defined in and validated against the Entity table. See *Working with Entities (WENT)* for more information.
Number	See the *Calculations* above for a discussion.
Amount	See the *Calculations* above for a discussion.

Printing the Order Type Summary by Delivery Type Report (PDTS)

Purpose: Use this menu option to print the Order Type Summary Report by Delivery Type, which provides a summary of order information by order type and delivery type for a specified date range. This is useful if you want to review a snapshot of orders for today.

Order Delivery Type Summary Screen

Use this screen to define the selection criteria you wish to use to print the Order Type Summary by Delivery Type Report.

How to display this screen: Enter *PDTS* in the Fast path field at the top of any menu or select Order Type Summary by Delivery Type Report from a menu.

Field	Description
Start date	The first order date to include on the report. The system includes orders whose Order date in the Order Header table is equal to or greater than this date. The From date cannot be greater than the To date. The date cannot be greater than the current date. If you enter a From date, you must also enter a To date. Numeric, 6 positions (in user date format); required.

Field	Description
End date	The last order date to include on the report. The system includes orders whose Order date in the Order Header table is equal to or earlier than this date. The From date cannot be greater than the To date. The date cannot be greater than the current date. If you enter a From date, you must also enter a To date. Numeric, 6 positions (in user date format); required.

Screen Option	Procedure
Generate the *Order Type Summary by Delivery Type Report*	Enter a date range and select *Submit*. The system submits the MSR1174RPT job to generate the report and returns you to the main menu.

Managing Declined Authorizations

In this part: This part presents the functions available to cancel orders that are declined by an authorization service, and includes the following topic:

- *Working with Credit Card Cancellations (WCCC)* shows you how to cancel orders flagged for cancellation due to credit card decline.

Working with Credit Card Cancellations (WCCC)

Purpose: Use the Work with Credit Card Cancellations function to cancel orders whose credit cards have been declined by the authorization service.

In this topic:

- *Overview*
- *Cancel Credit Card Order Cancellation Screen*
- *Credit Card Order Cancellation List*

Overview

You can define different actions to take for each vendor response code you receive from an authorization service. For example, if the service declines an authorization because the card is over its credit limit, you could set up the system to put the order on hold for five days and reattempt authorization after that time. You have the option of setting up a vendor response so that the system will flag the order for cancellation, either when the credit card is first declined or after a given number of attempts.

Determining when to flag for cancellation: The system determines that an order should be flagged for cancellation based on the number of declines received from the authorization service. You can set up the maximum number of declines in two ways:

- *vendor response code:* Specify the maximum number of attempts for an individual vendor response code. For example, a vendor response code that indicates credit card fraud might trigger cancellation after one authorization attempt; a vendor response code that indicates insufficient credit limit might trigger order cancellation after four or more attempts. Some response codes might be set up to attempt authorization an unlimited number of times, and never trigger a cancellation.

- *system control value:* The *Maximum Number of Retries on Credit Card Orders (E74)* system control value specifies the number of times to attempt reauthorization across all vendor responses. Overrides the limits you set up for individual response codes; in other words, if you specify you will attempt authorization 15 times for a vendor response code, but the system control value is set to 10, the system will not exceed 10 attempts.

The counter for authorization attempts is reset when you receive an authorization.

Example: An order:

- fails authorization three times
- is authorized
- you make a partial shipment
- the order fails authorization again

This last decline counts as response number one.

What happens when an order is flagged for cancellation? The system creates a record in the Backorder Cancellation Pending table (*BOCANP*). These records are assigned a type of *C*, to distinguish them from orders flagged for cancellation due to a backorder. In addition, the system writes:

- an Order History message, which you can review in standard or streamlined order inquiry by selecting *Messages*; see *Display Order History Screen*
- a cancel date on the order detail line, which you can review in standard order inquiry by selecting *Display* for an item or in streamlined order inquiry by selecting the *Detail* option; see *Reviewing Order Details*.

If an order is flagged for cancellation but is not on hold, it will still be submitted for authorization.

Once an order is flagged for cancellation, you cannot exclude it when you cancel credit cards. Deleting the cancel date on the order detail line will not prevent the order from being canceled by this function. The system cancels every order flagged with a *C* in the Backorder Cancellation Pending table, and there is no visibility into this table through a Order Administration menu option.

What happens when you cancel orders? You can use the Work with Credit Card Cancellations menu option to cancel all orders flagged for cancellation due to credit card decline, or you can select all orders within a given range of cancel dates. The system:

- Cancels each flagged order, using the cancel reason specified for the vendor response code that triggered the cancellation. If the order is cancelled because it exceeded the maximum number of declines defined in the System Control table, the system uses the cancel reason code for the most recent vendor response that has a cancel reason code assigned. If none of the responses in the order's authorization history is assigned a cancel reason code, the system uses the default cancel reason defined in the *Auto Soldout Cancel Reason (C20)* system control value.
- Produces the *Credit Card Order Cancellation List*.

- Writes an order line history message for all canceled items (available by selecting *Message* for the item in standard or streamlined order inquiry) specifying the quantity canceled and the cancel reason code.
- Removes any pick slip preparation that has been applied to the order; see *Preparing Orders for Pick Slip Generation*.

> **Note:**
>
> If the cancel reason code set up to reduce demand, the order status after cancellation will be *X*; otherwise, the order status after cancellation will be *C*.

Cancellation email: The system generates an order cancellation email or to the customer if:

- you have specified an *Order Cancellation Email Program (K78)*, and
- there have not been any shipments on the order, and
- the cancel reason code you use does not match the *Cancel Reason Code to Suppress Email (L08)*, and
- the customer is eligible to receive email notifications; see *When Does the System Generate an Email Notification?*

For more information, see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

If there have been any shipments on the order, the system generates the order line cancellation email even if all the remaining order lines are now canceled.

See the *Order Cancellation Confirmation Email Sample and Contents* and the *Order Line Cancellation Confirmation Email Sample and Contents* for more information.

Stored value card authorization reversal: If a stored value card payment with an open, unused authorization amount exists on the order, the system also generates a stored value card authorization reversal; see *Stored Value Card Authorization Reversal*.

Periodic function: You can also set up credit card cancellations to run as part of your periodic processing, using function *BOR0029*. In this case, you would not be able to specify a range of dates; all flagged orders would be canceled.

Cancellation email: The system generates an order or order line cancellation email to the customer if:

- you have specified an *Order Cancellation Email Program (K78)* or *Order Line Cancellation Email Program (K79)*, and
- the cancel reason code you use does not match the *Cancel Reason Code to Suppress Email (L08)*, and
- the customer is eligible to receive email notifications; see *When Does the System Generate an Email Notification?*

See the *Order Cancellation Confirmation Email Sample and Contents* and the *Order Line Cancellation Confirmation Email Sample and Contents* for more information.

What happens if the order includes a membership item? If you use this menu option to cancel an order that includes a membership item, the order cancellation process does not automatically cancel the customer membership created by the membership item. You need to use *Working with Customer Memberships (WWCM)* in order to cancel the customer membership. See *Membership Overview* for background on customer memberships.

For more information:

- vendor response codes and an overview of the authorization process: *Defining Vendor Response Codes*
- *Establishing Cancel Reason Codes (WCNR)*
- *Establishing Order Hold Reason Codes (WOHR)*
- *Maximum Number of Retries on Credit Card Orders (E74)* system control value
- reviewing authorization history for an order: *Reviewing Financial Information on an Order*
- setting up periodic processing: *Working with Periodic Functions (WPER)*

Cancel Credit Card Order Cancellation Screen

How to display this screen: Enter *WCCC* in the Fast path field at the top of any menu or by selecting Work with Credit Card Cancellations from a menu.

Field	Description
Beginning date	The earliest cancel date to include when selecting credit card orders for cancellation. You cannot enter a beginning date without also entering an ending date. Numeric, 6 positions (in user date format); optional.
Ending date	The latest cancel date to include when selecting credit card orders for cancellation. You cannot enter an ending date without also entering a beginning date. Numeric, 6 positions (in user date format); optional.

Instructions:

- Optionally, complete the beginning and ending dates.
- Select *OK*. The system validates your entries and highlights any field you need to correct. Correct any fields and select *OK* again.
- Select *Accept*.
- If you have entered a range of dates, the system submits the job *CC_CANCELS*.
- If you have not entered a range of dates, the system displays the Confirm Cancellation of Orders window. At this window, select *OK* to confirm that you want to cancel all credit card orders flagged for cancellation; otherwise, select *Exit* to cancel.

The *CC_CANCELS* job cancels each order flagged for cancellation using the cancel reason code associated with the vendor response code received from the vendor. This job also generates the *Credit Card Order Cancellation List*.

Releasing Held Orders

Topics in this part: The following sections describe how to review and release held orders:

- *Introducing Order Hold Reason Codes* describes system-assigned hold reason codes and their application to orders, and presents the screens you work with to create user-assignable hold reason codes.
- *Working with Customer Fraud Tables (WCFD)* discusses the process of creating, changing, and deleting fraudulent customers based on customer name and address.
- *Working with Miscellaneous Frauds (WMFF)* discusses the process of creating, changing, and deleting fraudulent customers based on postal or zip code, credit card, and check.
- *Selecting Held Orders (ERHO)* describes the screens that provide your initial point of access to held orders display and release tables.
- *Displaying Order Hold Information* presents the customer screens you can use to investigate customer detail on a held order, and the Order Inquiry function you can use to review order status.
- *Performing the Release* presents a pictorial map of screen relationships between the Release Held Order scan screen and the Release Recipients screens, and discusses release functions you use to release orders by recipient, payment method, and order number.

Working with Customer Fraud Tables (WCFD)

Purpose: You can build several fraud tables on the system to evaluate customers to see if they are frauds, based on their:

- Names
- Addresses
- Postal codes
- Credit cards
- Checks

The system checks for fraudulent customers whenever you process a new order during order entry, or when you create a new customer through the Customer Maintenance table. When the system detects a fraud customer, based on the criteria you enter into the Customer Fraud table, the system places the customer's orders on hold and assigns a fraud reason code to the order.

Quotes: The system does not check for fraudulent customers until you convert a quote to an order; see *Entering Pre-Order Quotes* and *Converting Quotes to Orders*.

To create a customer fraud record: There are several ways you can create a customer fraud record:

- create a record using the *Create Fraudulent Customer Screen*.

> **Note:**
>
> Adding a customer to the Customer Fraud table does not by itself add a “fraud” flag to the customer's Hold/bypass/fraud field. You can add a flag to this field through order entry, order maintenance, or by working with the Customer Sold To or Customer Bill To table (See *Creating and Updating Sold-to Customers (WCST)* and *Creating and Updating Bill-to Customers (WCBT)*).

- enter *F* in the Hold/bypass/fraud field for a sold to customer. If you flag a sold to customer as fraud, the system creates a customer fraud record for the sold to customer and a separate customer fraud record for each ship to customer associated with the sold to customer.
- enter *F* in the Hold/bypass/fraud field for a bill to customer. If you flag a bill to customer as fraud, the system creates a customer fraud record for the bill to customer only.

In this topic:

- *Work with Fraudulent Customers Screen*
- *Create Fraudulent Customer Screen*

Work with Fraudulent Customers Screen

How to display this screen: Enter *WCFD* in the Fast path field at the top of any menu or select Work with Fraudulent Customers from a menu.

Field	Description
Match code	A user-defined code that includes parts of the customer's name, company name, and address, which is used to identify duplicate (and fraud) customers. The structure of the match code is defined in the Match Code table; see *Setting Up Match Codes (MMCH)*. Enter a full or partial match code and select *OK* to display customer fraud records in ascending match code order, beginning with your entry. Alphanumeric, 15 positions; optional.
First name	The customer's first name. Alphanumeric, 15 position; display-only.
Last name	The customer's last name. Enter a full or partial last name and select *OK* to display customer fraud records in ascending last name order, beginning with your entry. Alphanumeric, 25 positions, optional.

Screen Option	Procedure
Create a fraudulent customer	Select *Create* to advance to the *Create Fraudulent Customer Screen*.

<table>
<tr><th>Screen Option</th><th>Procedure</th></tr>
<tr><td>Change fraudulent customer information</td><td>Select Change for a fraudulent customer to advance to the:

Change Fraudulent Customers Screen if the fraudulent customer was created using the Create Fraudulent Customer Screen. At this screen you can change any field except Sequence number, Match code, and the three Fraud codes. See Create Fraudulent Customer Screen for field descriptions.

Note:
If you change the address of a fraudulent customer here, the system updates the corresponding Sold To Customer record automatically.
Change Customer Screen if the fraudulent customer was created by placing Fraud in the Hold/bypass/fraud field in the Customer Sold to table.
Change Ship To Screen if the ship to is associated with a sold to that has Fraud in the Hold/bypass/fraud field in the Customer Sold To table
Change Bill To Customer Screen if the fraudulent customer was created by placing Fraud in the Hold/bypass/fraud field in the Customer Bill To table.
</td></tr>
</table>

Screen Option	Procedure
Delete fraudulent customer information	Select *Delete* for a fraudulent customer to delete it. **Note:** If you delete a customer from the Sold To Customer table, the system also deletes the corresponding record from the Customer Fraud table; however, if you delete a customer from the Customer Fraud table, the Sold To Customer record remains in the Customer table, but without the fraud status.
Display fraudulent customers	Select *Display* for a fraudulent customer to advance to the Display Fraudulent Customers Screen.You cannot change any information on this screen. See *Create Fraudulent Customer Screen* for field descriptions.

Create Fraudulent Customer Screen

Purpose: Use this screen to add a customer to the Customer Fraud table.

How to display this screen: At the *Work with Fraudulent Customers Screen*, select *Create*.

Field	Description
Seq # (Sequence number)	A number the system assigns to each fraudulent customer you create. Numeric, 7 positions; display-only.
Match code	A code that includes elements of the customer's name and address, which is used to identify duplicate or fraud customers. The system generates a match code when you finish creating a new customer fraud record. Alphanumeric, 15 positions; display-only.

Field	Description
Fraud code 1	The first of three match codes, defined in the Customer Fraud table, that identifies the customer as fraudulent. A fraud match code exists for every customer in the Customer Fraud table. The system checks this table during order entry for the sold-to and bill-to addresses, and when you create a customer through customer maintenance. Alphanumeric, 15 positions; display-only.
Fraud code 2	The second of three user-defined match codes that identifies the customer as fraudulent. A fraud match code exists for every customer in the customer Fraud table. The system checks this table during Order Entry for the sold-to and bill-to addresses. Alphanumeric, 15 positions; display-only.
Fraud code 3	The third of three user-defined match codes that identifies the customer as fraudulent. A fraud match code exists for every customer in the customer Fraud table. The system checks this table during Order Entry for the sold-to and bill-to addresses. Alphanumeric, 15 positions; display-only.
Name	The following 5 fields are available for you to enter the customer's full name: **Prefix** A title that belongs before the customer's name (such as "Mrs." or "Dr."). Alphanumeric, 3 positions; optional. **First Name** The customer's first name. Alphanumeric, 15 positions; optional. **Initial** The initial of the customer's middle name. Alphanumeric, 1 position; optional. **Last Name** The customer's last name. Alphanumeric, 25 positions; optional. **Suffix** An addition to the customer's full name (such as "M.D.", "Fr.", or "III"). Alphanumeric, 3 positions; optional.
Company name	The name of the company associated with the order. Alphanumeric, 30 positions; optional.
Address	The customer's full street address. Alphanumeric, 4 lines of 32 positions; optional.
Apartment	The apartment number or suite number of the delivery address. To enter an apartment or suite address: 1.Type *APT* to indicate an apartment or type *STE* to indicate a suite. 2.Insert a space and type the number of the apartment or suite; for example *APT 4* or *STE 116*. Alphanumeric, 10 positions; optional.

Field	Description
Zip/city/state	Three fields are available for you to enter the customer's postal code, city, and state. **Zip** The postal code or zip code for this customer. Alphanumeric, 10 positions; optional. **City** The city in which the customer lives, or receives mail or shipments. Alphanumeric, 25 positions; optional. **State** The state or province in which the customer lives, or receives mail or shipments. **Note:** The system does not validate this address in the same way it validates a customer's address, as in order entry. For example, it does not validate that the state is associated with the SCF for the postal code. Alphanumeric, 2 positions; optional.
Country	The country where the customer lives. Alphanumeric, 3 positions; optional.
Notes	Three fields are available for you to enter additional notes about this fraudulent customer, such as why the customer is a fraud. If the fraudulent customer record was created by placing *F* in the Hold/bypass/fraud field in the Customer Sold to table or Customer Bill To table, you do not advance to the Change Fraudulent Customers screen when you wish to change fraudulent customer information; instead the system advances you to the Change Customer Screen (sold to fraud), Change Ship To Screen (ship to fraud) or Change Customer Bill To Screen (bill to fraud). If you wish to enter notes about a fraudulent customer created by placing *F* in the Hold/bypass/fraud field, you must enter the notes using the *Edit Customer Notes Screen* or *Work with Bill To Notes Screen*. Alphanumeric, three 60-position fields; optional.

Working with Miscellaneous Frauds (WMFF)

Purpose: You can establish miscellaneous frauds based on postal code, check, email address, or IP address.

The system checks the Miscellaneous Fraud table only if the *Fraud Checking (A68)* system control value is *selected*. **Quotes:** The system does not check the

Miscellaneous Fraud table until you convert a quote to an order; see *Entering Pre-Order Quotes* and *Converting Quotes to Orders*.

Defining miscellaneous frauds: The Type field indicates the type of information that is evaluated for fraud. Once you define the Type, enter the information that is fraudulent in the Code field.

Fraud Type	Results
E Email Address	The system compares the email addresses related to the order against the email addresses in the Miscellaneous Fraud table. Depending on which email address related to the order matched an email in the Miscellaneous Fraud table, the system puts the order on hold as follows: • order-level email address: *EO* hold • recipient, permanent ship-to customer or order-level shipping address: *ES* hold (**Note:** The system puts the order on hold for a recipient customer only if the matching email is the recipient's primary email address) • sold-to customer: *EC* hold (**Note:** The system puts the order on hold only if the customer's primary email address matches) • bill-to customer: *EB* hold (**Note:** The system puts the order on hold if the bill-to is on the order or just assigned to the sold-to customer) **Setting up a fraud email address:** When setting up a fraud email address, you can define a specific email address or you can use the asterisk (*) as a wildcard match. Options are: • *text@domain.com:* the email is flagged as fraud if it matches the specific email address. **Example:** If the fraud email is `johnsmith@kab.com`, then this specific email will be flagged as fraud, but `johnsmithers@kab.com` will not be flagged as fraud. • **@domain.com:* the email is flagged as fraud if its domain matches the specified domain. **Example:** If the fraud email is `*@kab.com`, then any email whose domain is `kab.com` will be flagged as fraud. `js@kab.com` will be flagged as fraud, but `js@twb.com` will not be flagged as fraud. • **text@domain.com:* the email is flagged as fraud if the text before the @ sign ends with the specified characters and is at the specified domain. **Example:** If the fraud email is `*smith@kab.com`, then any email whose text before the @ sign ends with `smith` and whose domain is `kab.com` will be flagged as fraud. `johnsmith@kab.com` will be flagged as fraud, but `johnsmitty@kab.com` will not be flagged as fraud. • *text*@domain.com:* the email is flagged as fraud if the text before the @ sign starts with the specified characters and is at the specified domain. **Example:** If the fraud email is `john*@kab.com`, then any email whose text before the @ sign starts with `john` and whose domain is `kab.com` will be flagged as fraud. `johnsmith@kab.com` and `johnsmitty@kab.com` will be flagged as fraud, but `jsmith@kab.com` will not be flagged as fraud.

Fraud Type	Results
I IP Address	When creating an order through the generic order API, the system updates the *IP address* in the Order Header Extended table if an ip_addr is provided in the *Inbound Order XML Message (CWORDERIN)*. The system then compares the IP address for the order with the IP addresses in the Miscellaneous Fraud table. IP address matching is based on a full or partial IP address specified in the Miscellaneous Fraud table, which permits asterisks to be used as "wild cards." For more information see the Web Services Guide on My Oracle Support (ID 2953017.1). *Example:* If the Miscellaneous Fraud record is `1.2.*.*`, then any IP addresses that begin with `1.2` will cause orders to go on hold (`1.2.3.4`, `1.2.99.7`, etc.). **About IP address:** The IP (internet protocol) address identifies where an order originates. The IP address is expressed as a series of four numbers separated by three periods (for example, `192.168.255.255`). Each number in the series must be from 1 to 255. Depending on the type of network where the customer is logged in, the first one, two, or three numbers between the periods typically represent the hosting network itself. The remainder of the IP address can be permanently assigned to the user's location (static IP address), or can be temporarily assigned each time the user logs in (dynamic IP address). In the case of a dynamically assigned IP address, creating a Miscellaneous Fraud record for the entire address would not be helpful, because the last portion of the address will be different every time. In this case, you can create a Miscellaneous Fraud record for the beginning portion(s) of the IP address, because this portion of the IP address identifies the hosting network. If the ip_addr matches the Miscellaneous Fraud record, the system puts the order on *IP* (IP address) hold and writes a message such as `SYS HLD---IP ADDRESS HOLD` (where `IP ADDRESS HOLD` is the description of the hold reason code) to the Order Transaction History table.
K Check	The system compares the micra number (routing number) on a check pay type against the micra numbers in the Miscellaneous Fraud table. If the micra number on the check pay type matches a micra number in the Miscellaneous Fraud table, the system places the order pay type on *KF* (check fraud) hold.

Fraud Type	Results
Z Zip Code	The system compares the postal code defined for a customer address against the postal codes in the Miscellaneous Fraud table. **Setting up a fraud zip code:** If you enter a 5-digit postal code in the Miscellaneous Fraud table, the system considers a postal code a match if the first 5 positions of the postal code defined for a customer address match the postal code in the Miscellaneous Fraud table. **Example:** if you enter `96624` in the Miscellaneous Fraud table, the system considers a customer address with postal code `96624` or postal code `96624-1620` as fraud. If the postal code for a customer matches a postal code in the Miscellaneous Fraud table, the system: • places the order bill to customer on *ZB* (bill to zip fraud) hold (the postal code for the bill to is fraudulent). • places the order sold to customer on *ZS* (sold to zip fraud) hold (the postal code for the sold to is fraudulent). • places the order ship to customer on *ZH* (ship to zip fraud) hold (the postal code for the ship to is fraudulent).

For more information: See *Introducing Order Hold Reason Codes* for more information on defining fraudulent hold reason codes.

In this topic:

- *Work With Miscellaneous Frauds Screen*
- *Create Miscellaneous Fraud Screen*

Work With Miscellaneous Frauds Screen

How to display this screen: Enter *WMFF* in the Fast Path field at the top of any menu or select this option from a menu.

Field	Description
Type	Indicates the type of information that is evaluated for fraud. Valid values are: • *Check* = the system compares the micra number (routing number) on a check pay type against the micra numbers in the Miscellaneous Fraud table. • *Email* = the system compares the email address against the email addresses in the Miscellaneous Fraud table. • *IP Address* = the system compares the ip_addr in the *Inbound Order XML Message (CWORDERIN)* when creating an order through the generic order API. • *Zip* = the system compares the postal code defined for a customer address against the postal codes in the Miscellaneous Fraud table. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Define a Type and select *OK* to display miscellaneous fraud records that match your entry. Optional.

Field	Description
Code	The information that is considered fraudulent, based on the code defined in the Type field. **Check code** The micra number located on the check. The micra number is also referred to as a routing number. Alphanumeric, 15 positions, optional. **Email address** The email address defined for an order or customer (sold to, bill to, or ship to). Alphanumeric, 50 positions; optional. **IP address** The full or partial IP address received for an order API (e-commerce) order. The IP address specified here can include asterisks (*) for “wild card” matching. For example, if the Miscellaneous Fraud record is `1.2.*.*`, then any IP addresses that begin with `1.2` will cause orders to go on hold (`1.2.3.4`, `1.2.99.7`, etc.). **Zip code** The postal code defined for the customer’s address. You can enter an extended, non-hyphenated code, or the initial 5 digits of the postal code. Define a Type and Code and select *OK* to display miscellaneous fraud records that match your entry. Alphanumeric, 9 positions, optional.

Screen Option	Procedure
Create a miscellaneous fraud customer	Select *Create* to advance to the *Create Miscellaneous Fraud Screen*.
Change miscellaneous fraud information	Select *Change* for a fraudulent customer to advance to the Change Miscellaneous Fraud Screen. At this screen you can only change fraud information. See *Create Miscellaneous Fraud Screen* for field descriptions.
Delete a miscellaneous fraud record	Select *Delete* for a fraudulent customer to delete it.
Display a miscellaneous fraud	Select *Display* for a fraudulent customer to advance to the Display Miscellaneous Fraud Screen. You cannot change any information on this screen. See *Create Miscellaneous Fraud Screen* for field descriptions.

Create Miscellaneous Fraud Screen

To create: Use this screen to add a fraudulent postal code, check, or email address to the Miscellaneous Fraud table.

How to display this screen: At the *Work With Miscellaneous Frauds Screen*, select *Create*.

Field	Description
Fraud type	Indicates the type of information that is evaluated for fraud. Valid values are: • *Check* = the system compares the micra number (routing number) on a check pay type against the micra numbers in the Miscellaneous Fraud table. • *Email* = the system compares the email address against the email addresses in the Miscellaneous Fraud table. • *IP Address* = the system compares the ip_addr in the *Inbound Order XML Message (CWORDERIN)* when creating an order through the generic order API. • *Zip* = the system compares the postal code defined for a customer address against the postal codes in the Miscellaneous Fraud table. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Required.
Fraud information	The information that is considered fraudulent, based on the code defined in the Type field. **Check code** The micra number located on the check. The micra number is also referred to as a routing number. Alphanumeric, 15 positions, optional.

Field	Description
	Email address The email address defined for an order or customer (sold to, bill to, or ship to).When setting up a fraud email address, you can define a specific email address or you can use the asterisk (*) as a wildcard match. Options are: • *text@domain.com:* the email is flagged as fraud if it matches the specific email address. **Example:** If the fraud email is `johnsmith@example.com`, then this specific email will be flagged as fraud, but `johnsmithers@example.com` will not be flagged as fraud. • **@domain.com:* the email is flagged as fraud if its domain matches the specified domain. **Example:** If the fraud email is `*@kab.com`, then any email whose domain is `kab.com` will be flagged as fraud. `js@kab.com` will be flagged as fraud, but `js@twb.com` will not be flagged as fraud. • **text@domain.com:* the email is flagged as fraud if the text before the @ sign ends with the specified characters and is at the specified domain. **Example:** If the fraud email is `*smith@kab.com`, then any email whose text before the @ sign ends with `smith` and whose domain is `kab.com` will be flagged as fraud. `johnsmith@kab.com` will be flagged as fraud, but `johnsmitty@kab.com` will not be flagged as fraud. • *text*@domain.com:* the email is flagged as fraud if the text before the @ sign starts with the specified characters and is at the specified domain. **Example:** If the fraud email is `john*@kab.com`, then any email whose text before the @ sign starts with `john` and whose domain is `kab.com` will be flagged as fraud. `johnsmith@kab.com` and `johnsmitty@kab.com` will be flagged as fraud, but `jsmith@kab.com` will not be flagged as fraud. Alphanumeric, 50 positions; required for an email address type.

Field	Description
	IP address The full or partial IP address received for an order API order. The IP address specified here can substitute asterisks (*) as "wild cards" for one or more of the four numbers that make up the IP address. For example, if the Miscellaneous Fraud record is `1.2.*.*`, then any IP addresses that begin with `1.2` will cause orders to go on hold (`1.2.3.4`, `1.2.99.7`, etc.). The system validates that your entry includes four numbers between 1 and 255, separated by three periods. Matching begins at the first number of the series and works back, which means that one or more numbers in the series can consist of a "wild card" asterisk; however, once the IP address includes an asterisk, the remainder of the IP address cannot include any more numbers. The system displays an error message if your entry: • includes any non-numeric characters • begins with a wild card (for example, `*.22.33.44`) • includes a wild card but does not end with one (for example, `12.*.33.4` or `11.2.*.4`) • includes both a wild card and a number between periods (for example, `123.45.67*.*` or `1.2.3.4*`) • includes a number greater than 255 • includes any blank spaces Alphanumeric, 15 positions; required for an IP address type.
	Zip code The postal code defined for the customer's address. You can enter an extended, non-hyphenated code, or the initial 5 digits of the postal code. When setting up a fraud zip code, if you enter a 5-digit postal code in the Miscellaneous Fraud table, the system considers a postal code a match if the first 5 positions of the postal code defined for a customer address match the postal code in the Miscellaneous Fraud table. **Example:** if you enter `96624` in the Miscellaneous Fraud table, the system considers a customer address with postal code `96624` or postal code `96624-1620` as fraud. Alphanumeric, 9 positions; required for a postal code type.

Selecting Held Orders (ERHO)

Purpose: You gain access to a list of held and suspended orders from the Release Held Orders scan screen. You can then use the subsequent screens to continue your scan for held orders, or to select individual orders for review or release.

Quotes: Held quotes are not included in the Release Held Orders (ERHO) menu option; you can use quote maintenance to remove the hold reason on the Work with Order screen from the quote; see *Maintaining Quotes in Order Maintenance*.

In this topic:

- *Release Held Order Scan Screen*
- *Release Held Orders Screen (Working with Releases)*

Release Held Order Scan Screen

Purpose: You can find held orders in two ways: by entering a specific customer number in the Customer number field, or by reviewing a list of orders by scanning on any other field on this screen. Optionally, you can display the *Held Order Summary Screen*, and select a hold reason for working with held orders.

How to display this screen: Enter *ERHO* in the Fast path field or select Release Held Orders from a menu.

Field	Description
Order #	A number the system assigns to identify an order. Enter a valid order number in this field to advance to the *Release Held Orders Screen (Working with Releases)*. Numeric, 8 positions; optional.
Customer #	A number to identify a customer who places an order. Enter a valid customer number to advance to the *Release Held Orders Screen (Working with Releases)*. Numeric, 9 positions; optional.
System hold reason	A code that identifies the reason the system put an order on hold. See *Introducing Order Hold Reason Codes*. Enter a system hold code in this field to advance to the *Release Held Orders Screen (Working with Releases)*. **Note:** You cannot search based on the Awaiting Credit Card Auth (CW) hold reason. Alphanumeric, 2 positions; optional.
User hold reason	A hold reason code assigned by an operator in Order Entry or Order Maintenance, or through the *Generic Pick In API (Shipments, Voids, and Backorders)*. See *Establishing Order Hold Reason Codes (WOHR)*. For more information, see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Enter a user hold code in this field to advance to the *Release Held Orders Screen (Working with Releases)*. Alphanumeric, 2 positions; optional.
Order date	The date an order was entered. Enter a date in this field ato advance to the *Release Held Orders Screen (Working with Releases)*. Numeric, 6 positions (in user date format); optional.
Ship via	Represents a carrier who delivers merchandise to your customers. Enter a valid code in this field to display the *Release Held Orders Screen (Working with Releases)*. Numeric, 2 positions; optional.

Release Held Orders Screen (Working with Releases)

Purpose: This screen is your point of access to held orders.

How to display this screen: Enter valid criteria in one of the fields at the *Release Held Order Scan Screen*, or select a hold reason at the *Held Order Summary Screen*.

Using this screen: Use this screen to:

- Gain access to specific held order and customer information
- Perform releases at the bill-to record level
- Perform a global release on all orders listed
- Display hold reason codes

The appearance of this screen will vary depending on your selection criteria at the *Release Held Order Scan Screen*.

Additional fields: The fields not described under *Release Held Order Scan Screen* are:

Field	Description
New cust (New customer)	Indicates if the customer associated with the held order is a new customer, based on purchase history. • *selected* = The customer has placed an order, but no orders have shipped. The # orders LTD is equal to or greater than 1 and the # sales LTD is equal to 0 for the customer in the Customer Sold To Order History table. • *unselected* = The customer has placed an order and at least one order has shipped. The # orders LTD and # sales LTD is equal to or greater than 1 for the customer in the Customer Sold To Order History table.
Pay	This code indicates whether an order is on hold because of pay type. Valid values are: • *Yes* = order is on hold due to pay type • *No* = order is not on hold due to pay type
Rcp (Recipient)	This code indicates whether an order is on hold for reasons related to the recipient customer. Valid values are: • *Yes* = order is on hold due to recipient • *No* = order is not on hold due to recipient

Screen Option	Procedure
Release held orders by recipient	Select *Recipients* for an order to advance to the *Release Order Recipients Screen*.
Release an order from all holds	Select *Release* for an order to release holds without advancing to another screen. See *Performing the Release*.
Release held order payment method	Select *Payments* for an order to advance to the *Release Held Order Payment Methods Screen*.
Display customer information	Select *Cust Info* for an order to advance to the *First Display Customer Screen*.

Screen Option	Procedure
Display order hold reason codes	Select *Hold reasons* for an order to display a *Held Order Reasons Pop-Up Window (Displaying Hold Reason Codes)*.
Advance to standard Order Inquiry	Select *Order Inquiry* for an order to advance to the *Order Inquiry Header Screen* or the *Order Inquiry Detail Screen*, depending on the setting of the *Default Version for Order Inquiry (C34)* system control value. See *Using the Order Inquiry Header Screen to Review Held Orders* for a discussion on relevant information on the header screen in standard order inquiry.
Display order messages	Select *Messages* to advance to the Work with Order Messages Screen.

Managing Returns

In this part:

- *Introducing Return Authorizations (WRTA)* discusses the three stages of creating, receiving, and issuing credit for merchandise returns.
- *Selecting Orders for Return (WRTA)* shows you how to use the Select Order for Return Authorization screen to select an order for return authorization through the Work with Return Authorizations menu option.
- *Working with Return Authorizations: Standard Process* describes how to create or work with a return authorizations using the standard process, which involves creating, receiving, and crediting returns in separate steps.
- *Working with Return Authorizations: Streamlined Process* describes how to create or work with return authorizations using the streamlined process, which involves automatically processing the return authorization as far as your authority extends.
- *Receiving Returns (WRAR)* shows you how to receive returns into your warehouse using a separate menu option.
- *Crediting Returns (WRAC)* shows you how to credit returns using a separate menu option.
- *Processing Credits by Line of Business (MCLB)* describes how to process credits for a specific line of business and dollar amount.
- *Work with Return Interface Errors (WRIE)* describes the screens you use to review or delete return records which went into error status when received from an outside return system.
- *Inbound Return API* describes using the generic returns API (RETURNS_IN process) to create and process a return against an order detail line, based on XML messages from an external system.
  For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Working with Return Authorizations (WRTA)

For information on:	See:
The stages of creating, receiving, and issuing credit for merchandise returns; background	*Introducing Return Authorizations (WRTA)*
Selecting orders for return authorization and different scanning and selection options	*Selecting Orders for Return (WRTA)*
Standard return authorization processing through Work with Return Authorizations	*Working with Return Authorizations: Standard Process*
Streamlined return authorization processing through Work with Return Authorizations	*Working with Return Authorizations: Streamlined Process*

Receiving Returns (WRAR)

Purpose: Use the Work with Return Authorization Receiving menu option to perform the receipt phase of processing a return authorization. This phase consists of updating the order and posting the receipt into inventory. If the return includes an exchange, the exchange item is added to the order at this time.

Additional uses: You can also use this menu option to review information, or to change settings on the return authorization before processing the receipt. Additionally, you can advance to the *Work with Return Authorization Detail Screen*.

> **Note:**
>
> This screen is available regardless of whether you use the standard or streamlined process in Work with Return Authorizations.

Authority: You must have authority to *Enter Return Authorization (A28)* and *Receive Return Authorization (A29)* to use this menu option.

Other options: You can also use the Work with Return Authorizations menu option to perform each step of a return authorization, or you can use order maintenance to perform all steps of the return “behind the scenes.” You might choose to use the Work with Return Authorization Receiving menu option instead of these other options because it allows staff to process a series of receipts efficiently.

Pick slip preparation: When you select a return authorization to receive, the system removes any pick slip preparation from the order. When you accept or reject the return authorization receipt, the system determines if the order qualifies for pick slip preparation and reapplies it to the order. If you add an exchange item to the order, the system performs pick slip preparation for the exchange item when you receive the return authorization. See *Preparing Orders for Pick Slip Generation*.

In this topic:

- *Receive Returns Screen*

- *Receiving Returned Items*
  - *Receive All from First Screen*
  - *Receive Item*
  - *Receive All from Second Screen*
  - *Entering an Exchange Item*
  - *Create a Return Authorization/Misship*

For more information: See *Introducing Return Authorizations (WRTA)* for an overview of return authorizations.

Receive Returns Screen

This screen displays all return authorizations with pending merchandise returns.

How to display this screen: Enter *WRAR* in the Fast path field of any menu or select this option from a menu.

Field	Description
RA # (Return authorization number)	A number that identifies the return authorization, order, and shipping address. On this screen, this number is made up of three segments separated by hyphens: **Order number** A number to identify an order. Numeric, 7 positions; optional. **Ship-to number** The number of the shipping address on the order. Numeric, 3 positions; optional. **Return authorization number** The number of the return authorization against this order number and shipping address. Returns for the same order number and shipping address will appear as separate return authorizations if they were created separately. See *Working with Return Authorizations: Standard Process* for more information on return authorization header and detail structure. Numeric, 3 positions; optional.
Qty entered	The total quantity of the item(s) being returned on this return authorization. Numeric, 5 positions; display-only.
Date entered	The date the return authorization was created. Return authorizations can have multiple lines, each entered on separate dates; if so, the most recent date displays. The date entered appears beneath the quantity entered. Numeric, 6 positions (in user date format); display-only.
Qty received (Quantity received)	The total number of units received against the return authorization. Numeric, 5 positions; display-only.

Field	Description
Date received	The date that the return authorization line was received. Return authorizations can have multiple lines, each received on separate dates; if so, the most recent date displays. The date received appears beneath the quantity received. Numeric, 6 positions (in user date format); display-only.
Qty credited (Quantity credited)	The number of received units for which a credit was issued. Numeric, 5 positions; display-only.
Date credited	The date that a credit was issued. Return authorizations can have multiple lines, each credited on separate dates; if so, the most recent date displays. The date credited appears beneath the quantity credited. Numeric, 6 positions (in user date format); display-only.
Customer number	This number identifies the customer who placed the order. Scanning on this field is not currently implemented. Numeric, 9 positions; optional.
Customer name	The name of the customer. Alphanumeric, 30 positions; display-only.

Screen Option	Procedure
Receive one or more items	Select *Receive detail* for a return authorization to advance to the Work with Return Authorization Detail Screen.
Receive all returns	Select *Receive all* for a return authorization. See Receiving Returned Items.

Receiving Returned Items

Overview: You can receive returned items through the Receive Returns Screen in the following ways:

- Receive All from First Screen, select *Receive all* for a return authorization
- Receive Item, select *Receive detail* for a return authorization to advance to the Work with Return Authorization Detail Screen, where you can select one or more items for receipt
- Receive All from Second Screen, select *Receive detail* for a return authorization to advance to the Work with Return Authorization Detail Screen, where you can select *Receive All* to receive all items on the return authorization

Exchange item: You will need to enter an exchange item when processing a receipt if the return has an exchange reason code, and the Require Exchange Item at Time of Receipt (F42) system control value is *selected*. See Entering an Exchange Item.

Receive All from First Screen

Use this option if you do not need to review the items on the return authorization before processing the receipt.

Select *Receive all* for a return authorization at the Receive Returns Screen to display the Confirm Accept pop-up window.

If you select *OK*, all items on the return authorization will be received, and the return authorization will be removed from the Receive Returns screen.

> **Important:**
>
> You cannot undo the receipt once you select *OK*.

Receive Item

Use this option if you would like to review the items on the return authorization before receiving them, to receive one or more individual items, or to change settings on the return before processing the receipt.

1. Select *Receive detail* for a return authorization at the *Receive Returns Screen* to advance to the *Work with Return Authorization Detail Screen*.
2. *Review:* Optionally, select *Receive detail* for any item you would like to review to advance to the *RA Exchange Item Window (Review Exchange)* and the *RA Exchange Item Window (Review Exchange)* for an exchange.
3. *Change:* Optionally, select *Change* for any item you would like to change to advance to the *Change RA Detail Screen*.
4. select *Receive all* for each item that you want to receive to advance to the *Receive RA Items Screen (Receiving Detail)*.

You can also display this screen by selecting *Receive all* for an item at the *Work with Return Authorization Detail Screen* through *Working with Return Authorizations: Standard Process*.

To complete the Receive RA Items screen: You can change the Quantity returned, Disposition code, Warehouse, or Location fields.

Pop-up windows: If the item does not have a primary location, the system displays an informational pop-up window when you select *OK* if the *Display "No Primary Location" Message in Returns (G46)* system control value is *selected*.

Field descriptions: See *Working with Return Authorizations: Standard Process*.

Receive All from Second Screen

Use this option if you want to review the items on the return authorization before processing the entire receipt.

1. Select *Receive detail* for a return authorization at the *Receive Returns Screen* to advance to the *Work with Return Authorization Detail Screen*.
2. *Review:* Optionally, select *Receive detail* for any item you would like to review to advance to the *RA Exchange Item Window (Review Exchange)* and the *RA Exchange Item Window (Review Exchange)* for an exchange.
3. *Change:* Optionally, select *Change* for any item you would like to change to advance *Change RA Detail Screen*.
4. Select *Receive All* to receive all unreceived items on the return authorization. All items are removed from the screen.
5. Select *Accept* to accept your entries; otherwise, Select *Reject* to cancel.

When you select *Accept*, you return to the *Receive Returns Screen*. The receipt for each item is processed, and the return authorization is removed from the screen.

Error message: You cannot process two returns against the same Item Location in a warehouse at the same time. However, if you use the standard process, it is possible to have two returns created that point to the same Item Location, because no updates take place at the time you create the return authorization, only at the time of receipt. For this reason, the screen might display an error message at the time you attempt to receive all the items on a return authorization at once:

```
Multiple returns not allowed for same Item/Whse/Loc.
```

To correct, you can change the location to receive one or more of the returns, or process one of the returns completely before processing the other.

Entering an Exchange Item

If the *Require Exchange Item at Time of Receipt (F42)* system control value is *selected*, you will need to enter exchange item information for all exchanges when you process the receipt. The *Enter Exchange Item Screen* or window displays, depending on the steps you took to process the receipt; the fields on both the screen and the window are the same.

If the exchange item you enter is associated with any item comments, you advance to the *Work with Item/SKU Comments Window*.

Create a Return Authorization/Misship

You can select *Create* at the *Work with Return Authorization Detail Screen* in the Work with Return Authorization Receiving menu option to advance to the *R/A Select Order Detail Pop-Up Window*. At this window, you can:

Standard processing:

- *Create new return authorization:* If there are additional unreturned items on the order, you can select it and create a new return authorization.
- *Enter misship:* select *Exit* at this window to create and receive a misship return.

Streamlined processing: Advance directly to the *Create RA Detail Screen*. At this screen, you can add a misship item to the return authorization. You cannot create a new return authorization for a shipped item from the order.

About misships: The misship will be created and received when you accept.

Crediting Returns (WRAC)

Purpose: Use the credit return authorization function to process credits for return authorizations that have already been created and received. You can use this menu option regardless of whether you use the standard or streamlined process.

> **Note:**
>
> Misship returns do not display in this menu option, and are not available for crediting.

Additional uses: You can also use this menu option to review information on the return authorization before processing the credit.

Authority: You must have authority to create, receive, and credit a return authorization to use this menu option. The *Credit Return Authorization (A34)* secured feature controls this authority.

Other options: You can also use the Work with Return Authorizations menu option to perform each step of a return authorization. Also, you can use order maintenance to perform all steps of the return "behind the scenes." You might choose to use the Work with Return Authorization Credits menu option instead of these other options because it allows staff to process a series of credits efficiently.

See *Introducing Return Authorizations (WRTA)* for an overview of return authorizations.

> **Important:**
>
> You cannot change any of the settings on the return authorization through the Work with Return Authorization Credits menu option; instead, you should use Work with Return Authorizations if you wish to make any changes before processing the credit.

In this topic:

- *First Process RA Credits Screen*
- *Second Process RA Credits Screen*
- *Processing Credits*
  - *Credit All from First Screen*
  - *Credit Item*
  - *Credit All from Second Screen*

For more information:

- *Working with Return Authorizations: Standard Process*
- *Working with Return Authorizations: Streamlined Process*

First Process RA Credits Screen

This screen displays return authorizations that contain one or more RA detail lines with an uncredited quantity (the quantity returned - the quantity credited is greater than zero).

Use this screen to:

- select a return authorization to credit, either in full or for selected items only
- review additional information about return authorizations that have been received into your warehouse but not yet credited

Each return authorization that has been received but not yet fully credited is listed.

How to display this screen: Enter *WRAC* in the Fast path field at the top of any menu or select Process Return Authorization Credits from a menu.

Field	Description
RA # (Return authorization number)	A number that identifies the return authorization, order, and shipping address. On this screen, this number is made up of three segments separated by hyphens: **Order number** A number to identify an order. Numeric, 7 positions; optional. **Ship-to number** The number of the shipping address on the order. Numeric, 3 positions; optional. **Return authorization number** The number of the return authorization against this order number and shipping address. Returns for the same order number and shipping address will appear as separate return authorizations if they were processed separately. Numeric, 3 positions; optional.
Qty entered (Quantity entered)	The quantity of the item(s) being returned on this return authorization. Numeric, 5 positions; display-only.
Date entered	The date the return authorization was created. Return authorizations can have multiple lines, each entered on separate dates; if so, the most recent date displays. The date entered appears beneath the quantity entered. Numeric, 6 positions (in user date format); display-only.
Qty received (Quantity received)	The total number of units received against the return authorization. Numeric, 5 positions; display-only.
Date received	The date that the return authorization line was received. Return authorizations can have multiple lines, each received on separate dates; if so, the most recent date displays. The date received appears beneath the quantity received. Numeric, 6 positions (in user date format); display-only.
Qty credited (Quantity credited)	The number of received units for which a credit was issued. Numeric, 5 positions; display-only.
Date credited	The date that a credit was issued. Return authorizations can have multiple lines, each credited on separate dates; if so, the most recent date displays. The date credited appears beneath the quantity credited. Numeric, 6 positions (in user date format); display-only.
Customer number	This number identifies the customer who placed the order. Scanning on this field is not currently implemented. Numeric, 9 positions; optional.
Customer name	The name of the customer. The customer's name, or company name and contact, appear beneath the customer number. Alphanumeric, 30 positions; display-only.

Screen Option	Procedure
Credit return authorization detail lines separately	Select *Credit Detail* for a return authorization to advance to the *Second Process RA Credits Screen*.
Credit the entire return authorization	Select *Credit All* for a return authorization to credit all lines on the return authorization. See *Processing Credits*.

Second Process RA Credits Screen

Purpose: Use this screen to issue credit for one or more lines returned against an order. This screen displays items that you have received into your warehouse for the return authorization shown. Items on the return authorization but not yet received do not display.

Issuing credit to return authorizations line-by-line enables you to review item detail on the return authorization before selecting which lines to credit.

How to display this screen: Select *Credit Detail* for a return authorization at the *First Process RA Credits Screen*. You can also display this screen by selecting a return authorization to credit using *Working with Return Authorizations: Standard Process*.

Field	Description
RA # (Return authorization number)	A number that identifies the return authorization, order, and shipping address. On this screen, this number is made up of three segments separated by hyphens: Order number A number to identify an order. Numeric, 7 positions; display-only. Ship-to number The number of the shipping address on the order. Numeric, 3 positions; display-only. Return authorization number The number of the return authorization against this order number and shipping address. Returns for the same order number and shipping address will appear as separate return authorizations if they were processed separately. Numeric, 3 positions; display-only.
Customer number	This number identifies the customer who placed the order. Numeric, 9 positions; optional.
Customer name	The name of the customer. The customer's name, or company name and contact, appear to the right of the customer number. Alphanumeric, 30 positions; display-only.
Ln # (Line number)	The line number on the return authorization. Numeric, 3 positions; optional.
Item	A code representing a unit of inventory. Alphanumeric, 12 positions; optional.

Field	Description
SKU (Stock keeping unit)	The unique characteristics of an item, such as its size or color. **Note:** This field appears as one 14-position field; to scan, enter the complete SKU information, separating each SKU element with a space. Alphanumeric, 14 positions; optional.
Qty rtn'd (Quantity returned)	The number of units that have been returned to date. Numeric, 5 positions; optional.
Rtn rsn (Return reason)	Represents the reason for returning the item. Return reason codes are defined in and validated against the Return Reason table. See *Establishing Return Reason Codes (WRTR)*. Numeric, 3 positions; optional.
Xch rsn (Exchange reason)	Represents the reason for exchanging the item. Exchange reason codes are defined in and validated against the Exchange Reason table. See *Establishing Exchange Reason Codes (WEXR)*. Numeric, 3 positions; optional.
Merchandise value	The dollar value of the items returned, excluding freight, handling, tax, or additional charges. Numeric, 20 positions with a 2-place decimal; display-only.

Screen Option	Procedure
Display return authorization detail	Select *Display* for a return authorization to advance to the *Display RA Detail Screen*.
Credit the return authorization line	Select *Credit Line* for a returned item to credit it. See *Processing Credits*.
Credit all items on the return	Select *Credit All* to credit all displayed items. See *Processing Credits*.
Accept your entries	Select *Accept* to accept your entries and exit the screen. See *Processing Credits*.
Reject your entries	Select *Reject* to reject your entries and exit the screen. See *Processing Credits*.

Screen Option	Procedure
Exit the screen and return to the *First Process RA Credits Screen*	Select *Exit*. **Note:** This option is available only if you have not selected any items on the screen to process; otherwise, you must select *Accept* or *Reject* to exit.

Processing Credits

Overview: You can process credits though the *Crediting Returns (WRAC)* menu option in the following ways:

- *Credit All from First Screen:* select *Credit Line* for a return authorization at the *First Process RA Credits Screen*
- *Credit Item* select *Credit Line* for an item at the *Second Process RA Credits Screen*
- *Credit All from Second Screen:* select *Credit All* at the *Second Process RA Credits Screen*

Credit All from First Screen

Use this option if you do not need to review the return authorization before crediting.

Select *Credit Line* for a return authorization at the *First Process RA Credits Screen* to display the Confirm Accept pop-up window:.

Select *OK* at this window to process the credit. All received items on the return authorization will be credited, and the return authorization will be removed from the first Process RA Credits screen.

> **Important:**
>
> You cannot undo the credit once you select *OK*.

Credit Item

Use this option if you want to select an individual item (or items) from the return authorization to credit.

1. Select *Display* for a return authorization at the *First Process RA Credits Screen* to advance to the *Second Process RA Credits Screen*.
2. Optionally, select *Display* for any item you would like to review to advance to the *RA Exchange Item Window (Review Exchange)* and the *RA Exchange Item Window (Review Exchange)* for an exchange.

3. Select *Credit Line* for each item that you want to credit. The item is removed from the screen.
4. Select *Accept* to accept your entries; otherwise, select *Reject* to cancel.

When you select *Accept*, you return to the *First Process RA Credits Screen*. The credit for each selected item is processed, and the return authorization is removed from this screen if all items on the return authorization have been credited.

Credit All from Second Screen

Use this option if you want to review the items on the return authorization before crediting the entire return.

1. Select *Display* for a return authorization at the *First Process RA Credits Screen* to advance to the *Second Process RA Credits Screen*.
2. Optionally, select *Display* for any item you would like to review to advance to the *RA Exchange Item Window (Review Exchange)* and the *RA Exchange Item Window (Review Exchange)* for an exchange.
3. Select *Credit All* to credit all received items on the return authorization. All items are removed from the screen.
4. Select *Accept* to accept your entries; otherwise, select *Reject* to cancel.

When you select *Accept*, you return to the *First Process RA Credits Screen*. The credit for each item is processed, and the return authorization is removed from the screen.

Processing Credits by Line of Business (MCLB)

Purpose: Use Process Credits by Line of Business to release a batch of credits for a certain line of business and dollar amount.

> **Note:**
>
> In order to process credits by line of business, you must have authority to the *Enter Return Authorization (A28)*, *Receive Return Authorization (A29)*, and *Credit Return Authorization (A34)* secured features. If you do not have authority to one or all of these secured features, the system displays an error message.

When you process credits by line of business and dollar amount, the system selects the oldest credit associated with the line of business first, using the return entered date.

Maximum dollar amount: The system does not know the amount of the credit until the credit is created. Because of this, the system may release a dollar amount that exceeds the maximum dollar amount you specified. Once the system creates a credit that meets or exceeds the dollar amount specified, the system stops crediting, but includes the last credit that caused the dollar amount to go over.

Once the system stops crediting, the system generates the *Batch Release Summary Report*, which lists the orders associated with the credits released and the dollar amount of each credit.

Process Credits by Line of Business Screen

Purpose: Use this screen to release a batch of credits for a certain line of business and dollar amount.

How to display this screen: Enter *MCLB* in the Fast path field at the top of any menu or select Process Credits by Line of Business from a menu.

Field	Description
Line of business to credit	The code for the line of business you wish to credit. The system selects the oldest credit associated with the line of business first, using the return entered date. Line of business codes are defined in and validated against the Line of Business table. See *Working with Lines of Business (WLOB)*. Alphanumeric, 3 positions; required.
Amount to credit	The maximum amount you wish to credit for the line of business you selected. The system does not know the amount of the credit until the credit is created. Because of this, the system may release a dollar amount that exceeds the maximum dollar amount you specified. Once the system creates a credit that meets or exceeds the dollar amount specified, the system stops crediting, but includes the last credit that caused the dollar amount to go over. If you leave this field blank, the system processes all available credits for the line of business you selected. Numeric, 10 positions; optional.

Completing this screen: Select *Process* Once the *CREDITLOB* job completes, the system generates the *Batch Release Summary Report*.

Work with Return Interface Errors (WRIE)

Purpose: Use this menu option to review errors that occurred when processing a return from an external system.

Order Administration can receive returns from an external system through:

- the RETURNS_IN process in *Working with Integration Layer Processes (IJCT)*. See *Inbound Return API* for an overview.
- the ORDER_IN process in *Working with Integration Layer Processes (IJCT)*. However, the system does not post errors to this menu option. See *Generic Order Interface (Order API)* for an overview.
- For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

In this topic:

- *Return Interface Errors*
- *Work with Return Errors Screen*

Return Interface Errors

A list of errors that may occur when processing a return from an external system is presented below.

Error description	Reason
`Invalid Company`	The company code specified for the return was not a valid Order Administration company code.
`Invalid item/SKU for Order Detail Line`	The item information specified for the return is not located on the specified order line.
`Invalid Loc for Return`	The location for the return or the location associated with the *Default Return Disposition Code for Inbound Returns (H65)* is not a valid location for the warehouse specified.
`Invalid Order Detail Line`	The system: • Could not locate an order line to return against. • Could not return against the order line because there wasn't an available quantity to return, for example, the item had not shipped yet.
`Invalid Order Header`	The system could not locate an order to return against.
`Invalid Order Ship To`	The system could not locate a ship to order to return against.
`Invalid RA Detail`	The return authorization number for the return does not match the Line # field in the RA Detail table for the specified Order Administration order number, ship to number, and item.
`Invalid RA Header`	The return authorization number for the return does not match a return authorization number for the specified ship to order line.
`Invalid Return Quantity`	The return quantity does not match the quantity available to return for the order line. If you are returning against an RA, the quantity passed must match the quantity to return that was created on the RA.
`Invalid Return Reason`	The return reason specified is not a valid return reason code. Return reason codes are defined in and validated against the Return Reason table.
`Invalid Rtn Disposition`	The return disposition code is blank and a disposition code is not defined in the *Default Return Disposition Code for Inbound Returns (H65)* system control value.
`Invalid Sales Order Line Number`	The order line number specified does not exist on the specified order.
`Invalid Sales Order Number`	The system could not locate the order to return against.
`Invalid Whs for Return`	The warehouse for the return is not a valid warehouse.
`Line not eligible to be returned - quantity shipped is equal to 0`	The specified order line has not been shipped.
`Missing Company`	The return did not specify a Order Administration company code.

Error description	Reason
`Missing Default Charge Code (H64) for misc credit`	A credit amount was specified for the return and an additional charge code was not defined in the *Default Additional Charge Code for Inbound Returns (H64)* system control value to assign to the charge.
`Missing Return Reason`	The return reason is blank and a return reason code is not defined in the *Default Return Reason Code for Inbound Returns (H63)* system control value.
`No Active Paytypes`	This message could indicate that the payment method was deactivated for some reason, such as that it is a retail pickup or delivery order. See *Retail Pickup (including Ship-for-Pickup) or Delivery Orders* for background on retail pickup and delivery orders.
`No primary location defined for item`	The return disposition code specifies to return the item to its primary location and a primary location has not been defined for the item.
`Order Detail line already returned`	The item passed has already been returned for the available quantity.
`Quantity returned exceeds quantity remaining`	The quantity that is available to return on the specified order line is less than the requested quantity to return.
`Quantity returned exceeds quantity shipped`	The quantity shipped on the specified order line is less than the requested quantity to return.
`Return Already Processed`	The quantity available to return against the order line has already been returned and processed.
`Return not allowed for Retail Pickup/ Delivery Orders.`	The order specified is a retail pickup or delivery order, and the *Suppress Returns for Retail Pickup/Delivery (L88)* system control value is selected. See that system control value for background.
`Return not allowed for Ship for Pickup Orders.`	The order specified is a ship-for-pickup order, and the *Payment at POS for Ship for Pickup Orders (L60)* system control value is selected. See that system control value for background.

Work with Return Errors Screen

This screen displays all records in the Return Error table (CSRTER*)*. This table is not company-specific; return errors for all companies in an environment display.

How to display this screen: Enter *WRIE* in the Fast path field at the top of any menu or select Work with Return Errors from a menu.

Field	Description
Co# (company)	Order Administration company code. Enter the code for any company in the current environment to display return errors in that company. Numeric, 3 positions, optional.

Field	Description
Item	A code for item associated with the return. Item codes are defined in and validated against the Item table. Alphanumeric, 12 positions, display-only.
SKU	The SKU code for the item associated with the return. Alphanumeric, three 4-position fields; required if the item has SKUs.
Qty (quantity)	The number of units of the item being returned. Numeric, 5 positions, display-only.
Whs (warehouse)	A code for the warehouse to which the item will be returned, specified on the return authorization, or defaulted from the return disposition code on the return authorization. For returns received from an outside system without a return authorization, the return disposition code may default from system control value *Default Return Disposition Code for Inbound Returns (H65)*. For items with a return disposition code which specifies that the item not be returned to inventory, the warehouse code is *0*. Numeric, 3 positions, display-only.
Location	The warehouse location to which the item will be returned. Alphanumeric, 7 positions, display-only.
Order #/Line #	The order number, ship-to number, and line number of the Order Administration order associated with the return. Order number: numeric, 8 positions, display-only. Ship to number: numeric, 3 positions; display-only. Line number: numeric, 5 positions, display-only.
Error message (unlabeled field)	A brief description of the reason for the error. See *Return Interface Errors* for a list of possible errors. Alphanumeric, 25 positions, display-only.

Screen option	Procedure
Delete an error record from the Return Error table (CSRTER)	Select *Delete* for an error record to delete it. The record will be deleted from the Return Error table and will no longer display on the screen.
Display return error details	Select *Display* for an error record to advance to the *Display Return Error Screen*.

Display Return Error Screen

Purpose: Use this screen to review details of a return error record.

How to display this screen: Select *Display* for an error record at the *Work with Return Errors Screen*.

Field	Description
Sequence #	A number assigned by the system to the error record. Sequence numbers are assigned sequentially as errors are received, and are not reassigned when you delete a record. Numeric, 8 positions, display-only.
Company #	The code for the company. Numeric, 3 positions, optional.
Item/SKU	Item: a code for an existing unit of inventory. Item codes are defined in and validated against the Item table. SKU: a code that further defines an item's color, size, width, or any other type of user-defined attribute. Item: alphanumeric, 12 positions, display-only. SKU: three 4-position fields; display-only if the item has SKUs.
Return quantity	The number of units of the item which are being returned. Numeric, 5 positions, display-only.
Warehouse/Location	The warehouse and location to which the item will be returned, specified on the return authorization, or defaulted from the return disposition code on the return authorization. For returns received from an outside system without a return authorization, the return disposition code may default from system control value *Default Return Disposition Code for Inbound Returns (H65)*. For items with return disposition code which specifies that the item not be returned to inventory, the warehouse code is *0*. Warehouse: numeric, 3 positions, display-only. Location: alphanumeric, 7 positions, display-only.
Return reason	The return reason and description for the item, specified on the return authorization. For returns received from an outside system without a return authorization, the return reason code may default from system control value *Default Return Reason Code for Inbound Returns (H63)*. Reason: alphanumeric, 3 positions, display-only. Description: alphanumeric, 30 positions, display-only.
Return disposition	The return disposition code and description for the item, specified on the return authorization. The return disposition code determines whether the item being returned will affect inventory, and can specify the warehouse and location where the item will be returned, or that the item will be returned to its primary location. For returns received from an outside system without a return authorization, the return disposition code may default from system control value *Default Return Disposition Code for Inbound Returns (H65)*. Code: alphanumeric, 2 positions, display-only. Description: alphanumeric, 30 positions, display-only.
Order #/Line #	The order number, ship-to number, and line number of the sales order. Order number: numeric, 8 positions, display-only. Line number: numeric, 5 positions, display-only.

Field	Description
RA #/Line #	A number representing the return authorization, used as a suffix with the order number/ship to number of the order to identify a return authorization. Return authorization number: numeric, 3 positions; display-only. Line number: numeric, 3 positions; display-only.
Refund freight	A value indicating whether freight charges on the order will be refunded for a return. Specified on the return authorization. For returns received from an outside system without a return authorization, the Refund freight value may default from system control value *Refund Freight Default for Inbound Returns (H59)*. Alphanumeric, 1 position; display-only.
Refund handling	A value indicating whether handling charges on the order will be refunded for a return. Specified on the return authorization. For returns received from an outside system without a return authorization, the Refund handling value may default from system control value *Refund Handling Default for Inbound Returns (H61)*. Alphanumeric, 1 position; display-only.
Refund charges	A value indicating whether additional charges on the order will be refunded for a return. Specified on the return authorization. For returns received from an outside system without a return authorization, the Refund charges value may default from system control value *Refund Additional Charge Default for Inbound Returns (H60)*. Alphanumeric, 1 position; display-only.
Refund duty	A value indicating whether duty charges on the order will be refunded for a return. Specified on the return authorization. For returns received from an outside system without a return authorization, the Refund duty value may default from system control value *Refund Duty Default for Inbound Returns (H62)*. Alphanumeric, 1 position; display-only.
Misc credit amount	A credit amount passed from the outside system. Numeric, 13 positions with a 2-place decimal.
Called from	The outside system from which the return was received.
Error date/time	The date and time the record in error was received into Order Administration. Date: numeric, 6 positions, in user date format; display-only. Time: numeric, 6 positions, military time HH:MM:SS format; display-only.
Error message	A brief description of the reason for the error. See *Return Interface Errors* for a list of possible errors. Alphanumeric, 25 positions, display-only.

Issuing Refunds

Topics in this part:

- *Introducing the Refund Process* presents an overview of the refund process, including a discussion of situations that can cause a refund, refund types and reason codes.
- *Printing and Interpreting Refund Due Lists (MRDU)* explains how to print the Refund Due List and use this report to verify and document the changes you make to refunds prior to processing.
- *Working with Refunds, Writeoffs and Balances Due (WREF)* shows you how to research refunds, change a refund's type, place a refund on hold indefinitely or until a specific date, release a refund from hold, or change the refund's status so it will be canceled or written off when you next process refunds.
- *Processing Refunds (MREF)* shows you how to print and reprint refund checks and process credits and write-offs.
- *Printing the Processed Refund Register (PPRR)* explains how to generate the Processed Refund Register.
- *Processing Refunds by Order Number (MRFO)* explains how to generate refunds for selected orders only.

Printing and Interpreting Refund Due Lists (MRDU)

Purpose: The *Refund Due List* provides information about refunds and the orders associated with these refunds.

Use this report:

- as a guide for contacting customers to resolve outstanding balances due.
- to review refunds before processing refund checks and credits.
- to monitor writeoffs and refund aging.

You can print this report sorted by refund type or by order number:

- *Refund Due List by Type*. This report sorts refunds by refund type.
- *Refund Due List by Order #*. This report sorts refunds by order number.

The *Selection criteria* you define on the *Print Refund Due List Screen* controls the type of refunds that display on the report.

- *All* = The report includes all refunds, including balance dues and writeoffs.
- *Refunds Only* = The report includes refunds, excluding balance dues and writeoffs.
- *Balance Dues Only* = The report includes balance dues only.
- *Writeoffs Only* = The report includes writeoffs only.

Identifying a refund as a balance due: The system considers a refund a balance due if the Refund reason field for the refund is set to *B* (Balance due).

Identifying a refund as a write off: The system considers a refund a write off if the Refund status field for the refund is set to *W* (Write off pending).

Note:

If a refund is flagged as both a balance due and a write off, the write off setting will take precedence over the balance due setting. In this situation, if you select to generate the report for *Balance Dues Only*, the system will not include the refund on the report. If you select to generate the report for *Writeoffs Only*, the system will include the refund on the report.

Important:

If you generate the *Refund Due List* during a time when refunds are being processed, the totals and amounts on the report may not tie out correctly because the refunds that were being processed at the time the report was generated may not be reflected accurately on the report. You should generate the *Refund Due List* during a time when refunds are not being processed.

In this topic:

- *Print Refund Due List Screen*
- *Refund Due List*

Print Refund Due List Screen

How to display this screen: Enter *MRDU* in the Fast path field or select Print Refund Due List from a menu.

Field	Description
By refund type	Controls whether the system prints the *Refund Due List* sorted by refund type. Valid values are: • *Selected* = Print the *Refund Due List by Type*. • *Unselected* (default) = Do not print the *Refund Due List by Type*.
By order #	Controls whether the system prints the *Refund Due List* sorted by order number. Valid values are: • *Selected* = Print the *Refund Due List by Order #*. • *Unselected* (default) = Do not the *Refund Due List by Order #*.

Field	Description
Selection criteria	Controls the type of refunds included on the *Refund Due List*. Valid values are: • *All* = The report includes all refunds, including balance dues and writeoffs. • *Refunds Only* = The report includes refunds, excluding balance dues and writeoffs. • *Balance Dues Only* = The report includes balance dues only. • *Writeoffs Only* = The report includes writeoffs only. *Identifying a refund as a balance due:* The system considers a refund a balance due if the Refund reason field for the refund is set to *B* (Balance due). *Identifying a refund as a write off*: The system considers a refund a write off if the Refund status field for the refund is set to *W* (Write off pending). **Note:** If a refund is flagged as both a balance due and a write off, the write off setting will take precedence over the balance due setting. In this situation, if you select to generate the report for *Balance Dues Only*, the system will not include the refund on the report. If you select to generate the report for *Writeoffs Only*, the system will include the refund on the report.

Instructions:

1. Select the *By refund type* check box if you wish to generate the *Refund Due List by Type*, which sorts refunds by refund type.
2. Select the *By order #* check box to generate the *Refund Due List by Order #*, which sorts refunds by order number.
3. You can select both check boxes to generate both versions of the *Refund Due List*. If you do not select one of the check boxes, the system does not generate the *Refund Due List*.
4. Use the *Selection criteria* drop down box to select the type of refunds you wish to include on the *Refund Due List*.
5. Select *OK* to generate the report.
6. If you select to generate the *Refund Due List by Type* or both versions of the *Refund Due List*, a message similar to the following displays: `Job (REFDUE_TYP) has been submitted to batch`.
7. If you select to generate the *Refund Due List by Order #*, a message similar to the following displays: `Job (REFDUE_ORD) has been submitted to batch`.

Working with Refunds, Writeoffs and Balances Due (WREF)

Purpose: Use Work with Refunds to review refunds and change their status or type. For example, you could use this function to:

- place a refund on hold
- cancel a refund to a fraudulent customer
- review a refund record to find out its original payment type
- change a refund from a check to a stored value card refund
- release a held refund for processing
- writeoff an uncollectible balance due from a customer
- advance to Order Inquiry to research an order with a balance due

Order transaction history: The system creates an order transaction history message with a Type of *Refund* when you change a refund. The table below indicates the order transaction history message the system creates, based on the change made to the refund.

Refund Change	Order Transaction History Note
Place a refund on hold by selecting *Hold* for a refund	`Refund has been held`
Cancel a refund by selecting *Cancel* for a refund	`Refund changed to cancel pending`
Release a refund from hold by selecting *Release* for a refund	`Refund has been released`
Change a writeoff to a refund by selecting *Refund* for a refund in a pending writeoff status	`Refund chg from writeoff pend to open`
Change a refund to a writeoff by selecting *Write off* next to a refund	`Refund changed to writeoff pending`
Release all held refunds by selecting *Release All Held*	`Refund has been released` (the system writes this message for each refund that was released from hold)
Place a refund on manual hold by selecting the Manual hold field on the *Change Refund Screen* Release a refund from manual hold by deselecting the Manual hold field on the *Change Refund Screen*	`Refund Manual Hold has been changed`
Enter or update the date in the Hold until date field on the *Change Refund Screen* Remove the date in the Hold until date field on the *Change Refund Screen*	`Refund Hold Until Date has been changed`
Change the Pay type field on the *Change Refund Screen*	`Refund paytype has been changed`

The system also creates an order transaction history message when you process refunds; see *Processing Refunds (MREF)*.

> **Note:**
>
> The system does not create an order transaction history message when the system changes a refund during processing or when you access a refund without making any changes.

Sample order transaction history: You can review order transaction history messages on the Display Order History Screen.

Date	Type	Transaction Note	Amount	User
7/31/14	REFUND	Refund has been released		TBROWN

In this topic:

- *Work with Refunds Screen*
- *How Pay Type Determines Refund Type*
- *Change Refund Screen*
- *Changing the Refund Status*
- *Work with Refunds By Order# Screen*

Work with Refunds Screen

Purpose: After reviewing the *Refund Due List*, you may need to review or change some refunds before processing. Use the Work with Refunds screen to hold, release, cancel, writeoff, review, or change the type of refund a customer will receive.

> **Note:**
>
> A processed refund remains on this screen until you purge the order containing the refund.

How to display this screen: Enter *WREF* in the Fast path field or select Work with Refunds from a menu.

Refunds display on this screen in ascending refund status sequence; select *Display By Order* to display refunds in ascending order number sequence; see *Work with Refunds By Order# Screen*.

Field	Description
Ref Sts (Refund status)	The current status of the refund. Valid values are: • *C* = Cancelled • *H* = Held • *I* = ChannelAdvisor pending • *N* = Cancel pending • *O* = Open • *P* = Processed • *T* = Written off • *W* = Writeoff pending A second refund status in parentheses indicates that the system will evaluate the first status field when you process refunds and, if appropriate, process the refund based on the second status field. For example, a refund will be released from hold, if appropriate, and written off when you process refunds if it has a status of *H (W)*. Enter a refund status and select *OK* to display refunds is ascending refund status sequence, beginning with your entry. Alphanumeric, 1 position; optional.
Order #	A unique number to identify an order. Enter a valid order number and select *OK* to display refunds that match your entry. Numeric, 7 positions; optional.
Ord sts (Order status)	The current status of the order containing the refund. Valid values are: • *C* = Canceled • *H* = Held • *' '* = Open • *X* = Closed **Note:** As long as a refund's Ord sts = *H* (that is, the order is held), the refund will not be processed. Alphanumeric, 1 position; display-only.
Net	An asterisk indicates whether the refund is eligible for *Credit Card Net Exchange Billing*.

Field	Description
Type (Refund type)	Represents a type of refund. Valid values are: • *CC Credit* = A credit adjustment is sent to the credit card authorization service • *Check Credit* = The customer receives a refund check • *SVC* = Customer receives a new stored value card for the refund amount that can be used a payment towards a new purchase Select a refund type and select *OK* to display refunds that match your entry. See *How Pay Type Determines Refund Type*. Optional.
Ref date (Refund date)	The date the transaction that resulted in a refund occurred. Enter a date and select *OK* to display refunds that match your entry. Numeric, 6 positions (in user date format); optional.
Trn dt (Refund transaction date)	The date of the most recent transaction associated with the refund. Enter a date and select *OK* to display refunds that match your entry. Numeric, 6 positions (in user date format); optional.
Hold	Indicates whether the refund is on hold. A refund may be on hold because: • the amount of the refund exceeds the maximum amount specified in *Working with Pay Types (WPAY)*. • you placed the refund on hold through Work with Refunds. Valid values are: • *Yes* = The refund is on manual hold. • *No* = The refund is not on manual hold. Select *Yes* or *No* and select *OK* to display refunds that match your entry.
Hold date (Hold until date)	The date when the system will release a refund from hold. Enter a date and select *OK* to display refunds that match your entry. Numeric, 6 positions (in user date format); optional.
Reason (Refund reason)	The reason for the refund. Valid values are: • *B* = Balance due • *O* = Overpayment (initial overpayment or cancellation, including soldouts on prepaid orders) • *R* = Return Enter a reason code and select *OK* to display refunds that match your entry. Alphanumeric, 1 position; optional; assigned by the system.
Amount	The dollar amount to be refunded. The tax amount included in the refund amount is based on the tax rate that was effective when the item was shipped. A negative sign indicates a balance due from the customer. If you accept orders in foreign currencies, the system displays the amount in the foreign currency indicated by the Bank code. Enter an amount and select *OK* to display refunds whose amount is equal to or greater than your entry. Numeric, 13 positions with a 2-place decimal; optional.

Field	Description
Bank	The bank associated with the source code on the order. You associate a source code with a bank by specifying a division when you create the source code, because each division is associated with a bank. When you generate refund checks, the system uses the next check number indicated for the bank in the Bank table. See *Working with Banks (WBNK)*. If the *Multi Currency by Offer (E03)* system control value is *selected*, you must define the currency to be used for each offer. Each currency you define on the system must be associated with a unique bank, so the bank code that appears on this screen indicates the currency of the order. If you use multi currency, the prices and other amounts on an order appear in the currency of the offer, but the system converts the figures into your local currency for order billing history. Similarly, the refund amount indicated is in the currency used on the order, indicated by the bank code. When you process the refund, the system uses the currency conversion rate that was in effect when the order was billed. Enter a bank code and select *OK* to display refunds that match your entry. Alphanumeric, 3 positions; optional.

Screen Option	Procedure
Change a refund record	Select *Change* for a refund to advance to the *Change Refund Screen*.
Place a refund on hold	Select *Hold* for the refund. See *Changing the Refund Status*.
Cancel a refund	Select *Cancel* for the refund. See *Changing the Refund Status*.
Display a refund	Select *Display* for a refund to advance to the Display Refund Screen. You cannot change any information on this screen. See Change Refund Screen for field descriptions.
Release a refund from hold	Select *Release* for the refund. See *Changing the Refund Status*.
Change a writeoff to a refund	Select *Write Off* for the refund in pending writeoff status. See *Changing the Refund Status*.
Change a refund to a writeoff	Select *Refund* for the refund. See *Changing the Refund Status*.
Advance to Order Inquiry for the order containing the refund	Select *Ord Inq* for a refund.

Screen Option	Procedure
Display refunds in ascending order number sequence	Select *Display By Order* to advance to the *Work with Refunds By Order# Screen*. **Note:** If you advance to this screen and select *Exit*, the system returns you to the main window and not the *Work with Refunds Screen*.
Release all held refunds	Select *Release all held*. See *Changing the Refund Status*.
Print the *Refund Due List*	Select *Print list*.

How Pay Type Determines Refund Type

Overview: The pay type that a customer uses on an order determines the type of refund received, depending on how you have defined the pay type.

Payment category: When you create a pay type, you must assign it to one of five payment categories. Each payment category automatically produces a certain refund type, as follows.

Payment Category	Produces Refund Type
Cash/check (1)	Check
Credit card (2)	Credit card credit

See the field descriptions at the *Change Refund Screen* for more information on each of the refund types.

Alternate refund type: When you define an alternate refund type for a pay type, the system automatically generates refunds of the alternate refund type.

The system accepts only stored value card or cash/check alternate refund types.

Alternate refund category: When you define an alternate refund category for a pay type, you give yourself the option of changing the refund to the type that corresponds to this category.

The system accepts only cash/check alternate refund categories. However, you can change any type of refund to a stored value card credit at the *Change Refund Screen*.

See *Working with Pay Types (WPAY)*.

Stored Value Card Refunds

The system generates a stored value card refund when:

- The alternate refund type defined for a pay type is a stored value card.

- You process a return outside the *Return Grace Period (B52)* and the *Alternate Pay Type (B51)* is a stored value card pay type.
- You change a refund to a stored value card refund in Work with Refunds (WREF).

> **Note:**
>
> If you process a return against a stored value card pay type that does not have an alternate pay type or alternate refund category defined, the system generates a credit card credit refund against the original stored value card pay type, allowing you to reimburse the original stored value card instead of sending the customer a new card. However if the customer no longer has the original stored value card, you can change the credit card credit refund to a stored value card refund by changing the Type field on the *Change Refund Screen* to *V* (stored value card refund); by doing this, the system sends a new stored value card to the customer for the refund amount.

For more information: See *Generating Stored Value Card Refunds* for an overview and required setup.

Changing a Refund

You can change a refund at the *Change Refund Screen* by entering a new pay type in the Pay type field. If you do this, the system updates the refund type based on the pay category of the new pay type. For example, if you change the pay type to a check pay type, the system updates the refund type to *Check Credit*.

The system allows you to change the original pay type defined for the refund to another pay type, if:

- The new pay type is the same pay category as the original pay type associated with the refund. For example, if the original pay type is a credit card pay type, the system allows you to change the pay type to another credit card pay type. In this example, the refund type does not change.
- The new pay type is the same pay category as the alternate refund type defined for the original pay type associated with the refund. For example, if the original pay type is a credit card with an alternate pay type of cash/check, the system allows you to enter a cash/check pay type in the Pay type field. In this example, the refund type changes based on the pay category of the pay type.
- The new pay type is the same pay category as the alternate refund category defined for the original pay type associated with the refund. For example, if the original pay type is a credit card with an alternate pay category of cash/check, the system allows you to enter a cash/check pay type in the Pay type field.
- The new pay type is a stored value card pay type. In this scenario, the system updates the refund type to *V* (stored value card).

Eligible refund changes: The table below indicates the type of pay type you can enter in the Pay type field, based on the original pay type (and its alternate refund type/category) associated with refund.

> **Note:**
>
> You can always change the pay type defined for the refund to a stored value card pay type; this updates the refund type to V (stored value card credit)

If original pay type is:	And alternate refund type or category is:	You can change the pay type defined for the refund to:
cash check	blank or cash/check	cash/check pay type (refund type *Check Credit*)
credit card	blank	original pay type for the refund (refund type *CC Credit*)
	cash/check	original pay type for the refund (refund type *CC Credit*) cash/check pay type (refund type *Check Credit*)

> **Note:**
>
> The system does not allow you to change a credit card credit to another credit card pay type.

Stored value card pay types: If the original pay category and current pay category associated with the refund is a stored value card pay type (pay category Credit Card) and Card type Stored Value), the system allows you to change the refund by entering a different refund type in the Type field. You can only change the refund type to a *credit card credit* or *stored value card credit*.

- If the refund is a credit card credit, the system adds the refund amount to the original stored value card on the order.
- If the refund is a stored value card credit, the system generates a new stored value card for the refund amount.

Change Refund Screen

Purpose: Use this screen to review a refund, change the type of refund, place a refund on hold, release a refund from hold, or enter a date on which to release the refund from hold.

To change a refund: See *Changing a Refund* for an explanation of the options available when changing a refund.

To place a refund on hold: Select the Hold field and optionally, enter a date in the Hold until date field. If you enter a hold until date, the system automatically releases the refund from hold on that date.

To release a refund from manual hold: Deselect the Hold field.

How to display this screen: Select *Change* for a refund at the *Work with Refunds Screen*.

> **Note:**
>
> You cannot change a refund once it has been processed.

Field	Description
Order #	A unique number the system assigns to identify an order. Numeric, 7 positions; display-only.
Sold to (Sold to customer number)	The number of the customer or company that placed the order. The customer's or company's name appears as an unlabeled field to the right of the customer number. Numeric, 9 positions; display-only.
Bill to (Bill-to customer number)	The number of the customer or company responsible for paying for the order. The bill-to customer number appears only if there is a bill-to customer associated with the order producing the refund; in this situation, the refund check will be generated for the bill-to customer rather than the sold-to customer. The bill-to customer's and/or company's name appears as an unlabeled field to the right of the bill-to customer number. Numeric, 7 positions; display-only.
Amount	The dollar amount to be refunded. The tax amount included in the refund amount is based on the tax rate that was effective when the item was shipped. A negative sign indicates a balance due. Numeric, 20 positions with a 2-place decimal; display-only.
***NET BILLING**	The text `*NET BILLING` displays to the right of the Amount if the refund is associated with *Credit Card Net Exchange Billing*. In this situation, the Pay type field is display-only on this screen.
Status (Refund status)	The current status of the refund. Valid values are: • *Canceled* • ChannelAdvisor pending • *Held* • *Cancel pending* • *Open* • *Processed* • *Written off* • *Writeoff pending* The description associated with the status appears as an unlabeled field to the right. Display-only.

Field	Description
Type (Refund type)	Represents the kind of refund the customer will receive. The description associated with the type appears as an unlabeled field to the right. Valid values are: • *CC Credit* = A credit adjustment is sent to the credit card authorization service • *Check Credit* = The customer receives a refund check. • *SVC Credit* = The customer receives a new stored value card for the refund amount that can be used towards a new purchase; see *Stored Value Card Refunds*. The system allows you to change the refund by entering a pay type in the Pay type field; see *Changing a Refund*. See *How Pay Type Determines Refund Type*. Display-only.
Manual hold	Indicates whether the refund is on hold because: • you placed it on hold though Work with Refunds, or • the system placed the refund on hold because the refund amount exceeds the maximum amount defined for the pay type. Valid values are: • *Selected* = The refund is on hold. Changing this value to *selected* does not affect the Refund status field, but the refund will not be processed when you process refunds. • *Unselected* = The refund is not on hold. Changing this value to *unselected* when the refund is currently in a held status changes the Refund status field to *H (O)*, and the refund will be processed when you process refunds.
Hold until date	The date when the system will release a refund from hold. **Note:** Entering a date in this field does not by itself hold the refund; the refund status must be *Held* or the value in the Manual hold field must be *selected* to hold the refund until this date. Numeric, 6 positions (in user date format); optional.
Current category	The current payment category of the refund. The current category may change if you change the pay type of the refund. See the description of the Pay type field. Valid values are: • *Cash/check* • *Credit card* Display-only.

Field	Description
Original category	The category of the payment type used on the order. May differ from the current category if there is an alternate refund type or alternate refund category. Valid values are: • *Cash/check* • *Credit card* Display-only.
Refund date	The date when the transaction that resulted in a refund occurred. Numeric, 6 positions (in user date format); display-only.
Trans date (Transaction date)	The date of the most recent transaction associated with the refund. Numeric, 6 positions (in user date format); display-only.
Refund reason	Identifies the reason for the refund. Valid values are: • *Balance due* • *Overpayment* = initial overpayment or item/order cancellation, including soldouts on prepaid orders • *Return* Display-only.
Pay type	A code for the payment method of the refund. Pay types are defined in and validated against the Pay Type table. See *Working with Pay Types (WPAY)*. The system creates the refund in the same pay type used on the order. However, if an Alternate refund type is defined for that pay type, the system creates the refund in the alternate type. The system allows you to change the pay type of the refund to another pay type; see *Changing a Refund* for the available options. The description associated with the pay type appears as an unlabeled field to the right. **Note:** This field is display-only if the refund is associated with *Credit Card Net Exchange Billing* (the text `*NET BILLING` displays to the right of the Amount field). Numeric, 2 positions; optional.
RA# (Return authorization number)	The number the system assigns to a return authorization on an order. You can create a return authorization in Order Maintenance when you are expecting a customer to return an item. Using return authorizations help you control of the process of receiving and crediting returns. A value other than zero appears here if a return authorization caused the refund. Numeric, 3 positions; display-only.

Changing the Refund Status

How to change the status of a refund: To change the status of a refund, enter the appropriate option number next to the refund at the *Work with Refunds Screen*. Each option number works with only certain refund statuses. The table below outlines valid combinations. If you attempt an invalid status change, the system displays an error message.

Process	Option	Works on current status of	Result
Hold refund	*Hold*	*O* (open) *N* (cancel pending)	The Ref sts (refund status) field changes to *H* to indicate that the refund is held; it now appears in order number sequence among held refunds. The Manual hold field changes to *selected*. The refund will not be affected the next time you process refunds.
Cancel refund	*Cancel*	*H* (held*)* *O* (open) *W* (writeoff pending)	The Ref sts (refund status) field changes to *unselected* to indicate that a cancel is pending; the refund now appears in order number sequence among refunds pending cancellation. The refund will be canceled the next time you process refunds.
Release refund	*Release*	*H* (held) *N* (cancel pending)	The Ref sts (refund status) field changes to *O* to indicate that the refund is open for processing; it now appears in order number sequence among open refunds The refund will be processed the next time you process refunds.3
Change writeoff to refund	*Writeoff*	*W* (writeoff pending)1	The Ref sts (refund status) field changes to *O* to indicate that the refund is open for processing; it now appears in order number sequence among open refunds The refund will be processed the next time you process refunds.
Writeoff a refund	*Refund*	*H* (held *N* (cancel pending) *O* (open)2	The Ref sts (refund status) field changes to *W* to indicate that a writeoff is pending on the refund; the record now appears in order number sequence among pending writeoffs The refund will be written off the next time you process refunds

1 Writeoffs must have a positive refund amount to be changed to refunds.

2 Refunds must be prepaid payment types to be written off.

3 A refund will remain on hold as long as the order containing the refund is on hold (Ord sts = *H*)

Release all held refunds: You can also release all held refunds at once by selecting *Release all held*. The system displays a pop-up window indicating that held refunds are about to be released.

Work with Refunds By Order# Screen

Purpose: Use this screen to review and work with refunds in ascending order number sequence.

> **Note:**
>
> To review and work with refunds in ascending refund status sequence, use the *Work with Refunds Screen*.

> **Note:**
>
> A processed refund remains on this screen until you purge the order containing the refund.

How to display this screen: Select *Display By Order* on the *Work with Refunds Screen*.

Field	Description
Ref Sts (Refund status)	The current status of the refund. Valid values are: • *C* = Cancelled • *H* = Held • *I* = ChannelAdvisor pending • *N* = Cancel pending • *O* = Open • *P* = Processed • *T* = Written off • *W* = Writeoff pending A second refund status in parentheses indicates that the system will evaluate the first status field when you process refunds and, if appropriate, process the refund based on the second status field. For example, a refund will be released from hold, if appropriate, and written off when you process refunds if it has a status of *H (W)*. Alphanumeric, 1 position; display-only.
Order #	A unique number to identify an order. Enter a valid order number and select *OK* to display refunds in ascending order number sequence, beginning with your entry. Numeric, 7 positions; optional.

Field	Description
Ord sts (Order status)	The current status of the order containing the refund. Valid values are: • *C* = Canceled • *H* = Held • *' '* = Open • *X* = Closed **Note:** As long as a refund's Ord sts = *H* (that is, the order is held), the refund will not be processed. Alphanumeric, 1 position; display-only.
Net	An asterisk indicates whether the refund is eligible for *Credit Card Net Exchange Billing*.
Type (Refund type)	Represents a type of refund. Valid values are: • *CC Credit* = A credit adjustment is sent to the credit card authorization service • *Check Credit* = The customer receives a refund check • *SVC* = Customer receives a new stored value card for the refund amount that can be used a payment towards a new purchase Select a refund type and select *OK* to display refunds that match your entry. See *How Pay Type Determines Refund Type*. Optional.
Ref date (Refund date)	The date the transaction that resulted in a refund occurred. Enter a date and select *OK* to display refunds that match your entry. Numeric, 6 positions (in user date format); optional.
Trn dt (Refund transaction date)	The date of the most recent transaction associated with the refund. Enter a date and select *OK* to display refunds that match your entry. Numeric, 6 positions (in user date format); optional.
Hold	Indicates whether the refund is on hold. A refund may be on hold because: • the amount of the refund exceeds the maximum amount specified in *Working with Pay Types (WPAY)*. • you placed the refund on hold through Work with Refunds. Valid values are: • *Yes* = The refund is on manual hold. • *No* = The refund is not on manual hold. Select *Yes* or *No* and select *OK* to display refunds that match your entry.
Hold date (Hold until date)	The date when the system will release a refund from hold. Enter a date and select *OK* to display refunds that match your entry. Numeric, 6 positions (in user date format); optional.

Field	Description
Reason (Refund reason)	The reason for the refund. Valid values are: • *B* = Balance due • *O* = Overpayment (initial overpayment or cancellation, including soldouts on prepaid orders) • *R* = Return Enter a reason code and select *OK* to display refunds that match your entry. Alphanumeric, 1 position; optional; assigned by the system.
Amount	The dollar amount to be refunded. The tax amount included in the refund amount is based on the tax rate that was effective when the item was shipped. A negative sign indicates a balance due from the customer. If you accept orders in foreign currencies, the system displays the amount in the foreign currency indicated by the Bank code. Enter an amount and select *OK* to display refunds whose amount is equal to or greater than your entry. Numeric, 13 positions with a 2-place decimal; optional.
Bank	The bank associated with the source code on the order. You associate a source code with a bank by specifying a division when you create the source code, because each division is associated with a bank. When you generate refund checks, the system uses the next check number indicated for the bank in the Bank table. See *Working with Banks (WBNK)*. If the *Multi Currency by Offer (E03)* system control value is *selected*, you must define the currency to be used for each offer. Each currency you define on the system must be associated with a unique bank, so the bank code that appears on this screen indicates the currency of the order. If you use multi currency, the prices and other amounts on an order appear in the currency of the offer, but the system converts the figures into your local currency for order billing history. Similarly, the refund amount indicated is in the currency used on the order, indicated by the bank code. When you process the refund, the system uses the currency conversion rate that was in effect when the order was billed. Enter a bank code and select *OK* to display refunds that match your entry. Alphanumeric, 3 positions; optional.

Screen Option	Procedure
Change a refund record	Select *Change* for a refund to advance to the *Change Refund Screen*.
Place a refund on hold	Select *Hold* for the refund. See *Changing the Refund Status*.
Cancel a refund	Select *Cancel* for the refund. See *Changing the Refund Status*.

Screen Option	Procedure
Display a refund	Select *Display* for a refund to advance to the Display Refund Screen. You cannot change any information on this screen. See Change Refund Screen for field descriptions.
Release a refund from hold	Select *Release* for the refund. See *Changing the Refund Status*.
Change a writeoff to a refund	Select *Write Off* for the refund in pending writeoff status. See *Changing the Refund Status*.
Change a refund to a writeoff	Select *Refund* for the refund. See *Changing the Refund Status*.
Advance to Order Inquiry for the order containing the refund	Select *Ord Inq* for a refund.
Print the *Refund Due List*	Select *Print list*.

Processing Refunds (MREF)

Purpose: Use the Process Refunds function to:

- print refund checks
- generate credit card credits, including credits to a stored value card
- process writeoffs
- process refund cancellations
- print credit card credit acknowledgements and/or generate email notices
- generate stored value card credits (issue a new stored value card for the credit amount)

You can process any one refund type or a combination of refund types. You can also process all open refunds of a selected type, or you can specify a dollar limit to process for each. The function generates a register for each refund type and for writeoffs, including amounts, customer names, and order numbers. At this time, any refunds in *unselected* (cancel pending) status will be canceled, but no report is produced.

Which orders and refunds are eligible for processing? To determine whether to process a refund for an order, or to cancel or writeoff the refund if appropriate, the system checks:

- *order status:* The *Ord sts (Order status)* must be open, closed (*X*), or canceled (*C*). The system will not generate a refund if the order is held (*H*), or suspended (*S*).
- *refund status:* The *Ref Sts (Refund status)* must be open (*O*), cancel pending (*N*), or writeoff pending (*W*). The refund status cannot be held (*H*), processed (*P*), canceled (*C*) or written off (*T*). If the refund has a separate status in parentheses (for example, *O (H)*), then the status in parentheses applies.
- *manual hold:* If the *Manual hold* flag for the refund is *selected*, the refund will not be processed.
- *bank:* The order must have the same *Bank* as the one you specify at the *Process Refunds Screen*.

If there is more than one refund eligible for processing on a single order, all eligible refunds will be processed.

Generating refunds for selected orders: You can use the *Process Refunds by Order Screen* to generate refunds for selected orders only. See *Processing Refunds by Order Number (MRFO)*.

Multiple currency by offer: If you use *Multiple Currencies by Offer*, each refund you generate will be in the currency used on the order.

Suppressing refunds: You can suppress refund processing:

- For orders you receive through the *Generic Order Interface (Order API)*. In this situation, the refund is generated in a *N* (cancel pending) status. See *Suppressing Deposits and Refunds* for an overview.
- For orders associated with a return you receive through the *Inbound Return API*. In this situation, the refund is generated in a *N* (cancel pending) status. See *Suppressing Refunds* for an overview.

For more information, see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

ChannelAdvisor refunds: If any of the refunds eligible for processing are for orders whose order type matches the *ChannelAdvisor Order Type (L90)*, the refund generation program submits a refund request to ChannelAdvisor and does not actually generate the refund. See *ChannelAdvisor Integration Overview* for more information, especially *Submitting Refunds for ChannelAdvisor Orders*.

In this topic:

- *Multiple Currencies by Offer*
- *Refund Check Messages*
- *Process Refunds Screen*
- *Summary of Refund Processing Updates and Reports*
- *Refund Reports and Standard Programs*
- *Refund Check*
- *Refund Check Register*
- *Refund Writeoff Register*
- *Credit Card Credit Acknowledgment*
- *Credit Card Credit Register*

For more information: See *Reprint Refunds Screen (MREP)*.

Not in this topic: This topic does not explain how different types of refunds are generated or how you evaluate and change refunds before processing them. See *Printing and Interpreting Refund Due Lists (MRDU)*, and *Working with Refunds, Writeoffs and Balances Due (WREF)*.

Multiple Currencies by Offer

If you take orders in multiple currencies, then you will need to process refunds in these currencies as well. When you process refunds, you must indicate the bank code; since each currency is associated with a unique bank, this tells the system the currency of the refunds to generate. You can process refunds for only one currency at a time. (To take orders in multiple currencies, you must have the *Multi Currency by Offer (E03)* system control value selected.)

The dollar limit for foreign currencies: You can specify a dollar limit for each refund type if you are generating refunds in a foreign currency. The system interprets the limit in your local currency, but generates refunds in the foreign currency. For example, your local currency is U.S. dollars, and you are generating refund checks to your Canadian customers. You specify a dollar limit of $1,000. The system uses the currency conversion rate in effect for each order at the time it was billed to calculate each refund amount in U.S. dollars. The first refund, for $50 in Canadian currency, was on an order billed at a currency conversion rate of 1.29. The system calculates the value of the refund in your local currency as $38.76 (50/1.29). This leaves a maximum of $961.24, converted into your local currency, left to generate.

The system continues to process refunds in chronological order by refund date, stopping before it exceeds the dollar limit you defined in your local currency. The refund checks, however, will always be in the currency used on the order.

Refund Check Messages

You can enter up to three message lines to print on a refund check if your refund check print program supports them. You specify the print program in the *Refund Check Print Program (D23)* system control value. The base print program is *REFCHECK*.

To enter messages, you use the Work with Order Messages Screen, available by selecting *Messages* in order entry, order maintenance, or standard or streamlined order inquiry.

Process Refunds Screen

Purpose: Use this screen to process:

- refund checks
- credit card credits
- stored value card credits
- writeoffs

How to display this screen: Enter *MREF* in the Fast path field or select Process Refunds from a menu.

Field	Description
Generate refund checks	Determines whether to generate refund checks; see *Refund Check* for a sample and a description of its contents. Valid values are: • *Selected* = Generate checks. • *Unselected* (default) = Do not generate checks. The system produces the *Refund Check Register*. The system also prints checks for refunds that are eligible for processing and have a check refund type. Refund checks are written to the Refund Reconciliation table.

Field	Description
Amount to generate (Refund check amount to generate)	The maximum total dollar amount that you want to disburse in refund checks. The system prints checks for all eligible refunds in ascending chronological order based on refund date, and stops before exceeding this amount. If you are processing refunds in a foreign currency, the system evaluates the amount to generate in your local currency by converting the refund amount, using the conversion rate in effect when you billed the order. The refund check, however, will be in the foreign currency. If you leave this field blank, the system processes all eligible refund checks. Numeric, 10 positions; optional.
Bank	The bank associated with the source code on the order. You associate a bank with a source code by selecting a division for the source code; each division is associated with a bank. The system determines the next sequential check number to use by adding *1* to the Last check number defined in the Bank table. If you process orders in multiple currencies, the bank also indicates the currency of the refunds, since each currency on your system is associated with a unique bank. The bank you specify at this screen indicates the currency of all refund checks, credits, or writeoffs that you process at this screen. Bank codes are defined in and validated against the Bank table. See *Working with Banks (WBNK)*. Alphanumeric, 3 positions; required.

Field	Description
Generate credit card credits	Determines whether to generate refunds in the form of credit card credits. This setting includes refunds to a stored value card where the credit amount is applied back to the original stored value card; to issue a new stored value card for the credit amount you must use the *Generate SVC credits* option. Valid values are: • *Selected* = Generate credit card credits. • *Unselected* (default) = Do not generate credit card credits. Select this field to process credit card credits. The system generates a *Credit Card Credit Register* that identifies the amount, customer name, and order number of each credit processed. The system also produces either a *Credit Card Credit Acknowledgment* (if the *Print Credit Card Credit Acknowledgments (C35)* system control value is *selected*) or an email notification when the *Credit Card Credit Acknowledgement E-Mail Program (H08)* is set to *CCCNOTF*, (regardless of the setting of the *Print Credit Card Credit Acknowledgments (C35)* value) for each credit as appropriate; see *When Does the System Generate an Email Notification?* **Email template:** You can use the *Working with Entities (WENT)* menu option to create an entity-level email template, and the *Working with E-Mail Notification Templates (WEMT)* menu option to create a default company-level credit card credit template. The template specifies the text to print above and below the standard credit card credit information. **Note:** If the *XML Only* checkbox is selected, the *Sample Credit Card Credit Acknowledgement XML Message* is generated and the system does not create an email. For more information, see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). The system does not process a credit card credit against an installment or deferred billing order before the deposit has been processed. This ensures that you do not credit the customer's credit card before the card has been charged. **Note:** Sales Journal and deposit summary records may differ depending on how often you process credit card credits. **Scheduling:** You can schedule the generation of credit card credits using the *REFCCCR Process Credit Card Credit Refunds* periodic function.

Field	Description
Amount to generate (Credit card credit amount to generate)	The maximum total dollar amount that you want to process in credit card credits. The system issues credits for all eligible refunds in ascending chronological order based on refund date, and stops before exceeding this amount. If you are processing refunds in a foreign currency, the system evaluates the amount to generate in your local currency by converting the refund amount, using the conversion rate in effect when you billed the order. The credit, however, will be in the foreign currency. If you leave this field blank, the system processes all eligible credit card credits. Numeric, 10 positions; optional.
Generate SVC credits	Determines whether to generate stored value card credits. Valid values are: • *Selected* = Generate stored value card credits. • *Unselected* (default) = Do not generate stored value card credits. When you generate stored value card credits, the system issues a new stored value card to the sold to customer for the refund amount. The system: • Produces the *Stored Value Card Credit Register*. • Writes an order transaction history message: `F Stored Value Card refund created`. • Adds the stored value card item defined in the *Default SVC Refund Item Number (I73)* system control value to the order at no charge and performs pick slip preparation. **Note:** The system will not generate a stored value card refund unless the stored value card refund item has available inventory. If the item does not have available inventory, the stored value card refund remains unprocessed. • Generates a pick slip for the stored value card item if the *Default Pick Generation Template for SVC Refund Processing (I75)* system control value indicates a pick slip generation template. You can then follow the normal process of activating, billing, and shipping the stored value card to the customer. See *Generating Stored Value Card Refunds* for an overview. **Scheduling:** You can schedule the generation of stored value card credits using the *REFSVCR Process SVC Credit Refunds* periodic function.

Field	Description
	Note: The system can process stored value cards in the US currency only. If the order is for a currency other than US, you should generate a refund type other than stored value card for the order. The *Process Refunds Screen* displays an error message if you select to generate stored value card credits and the *Default SVC Refund Item Number (I73)* and/or *Price Override Reason for SVC Refund Item (I74)* system control values are unselected: `Sys Con Values I73 & I74 must be populated first`.
Amount to generate (Stored value card credit amount to generate)	The maximum total dollar amount that you want to process in stored value card refunds. The system issues credits for all eligible refunds in ascending chronological order based on refund date, and stops before exceeding this amount. **Note:** Stored value cards are only allowed in US currency. If you leave this field blank, the system processes all eligible stored value card credits. Numeric, 10 positions; optional.
Process writeoffs	Determines whether the system processes refunds to be written off. Valid values are: • *Selected* = Process writeoffs. • *Unselected* (default) = Do not process writeoffs. The system produces the *Refund Writeoff Register*. The system updates the writeoff amount for the customer. You can apply positive writeoff balances as credits and negative writeoff balances as charges against a new order placed by the customer.
Prior to date	Enter a date to specify that only writeoffs with a Refund created date earlier than the date you enter will be processed. If you leave this field blank, the system will process all refunds to be written off.

Instructions:

1. Select the Generate refund field for each type of refund you want to process.
2. Enter maximum amounts for each type of refund, if needed.
3. Specify the bank code associated with the refunds you wish to generate.

4. If you are processing refund checks, a pop-up window appears displaying the next available check number. You can accept the check number displayed, change the check number, or select *Exit* to close the window and cancel the action.
5. If you are generating unlimited credit card credits, a pop-up window displays confirming that you are not restricting these credits to a specific dollar amount. Again, you can accept or select *Exit* to close the window and cancel the action.
6. The system submits the batch job *REF_PROC,* which processes the refunds up to the specified dollar limits.

> **Note:**
>
> The system displays an error message if you select to generate stored value card credits and the *Default SVC Refund Item Number (I73)* and/or *Price Override Reason for SVC Refund Item (I74)* system control values are unselected: `Sys Con Values I73 & I74` must be populated first; see *Generating Stored Value Card Refunds*.

Summary of Refund Processing Updates and Reports

Update refunds: The status of each refund is updated, as well as the *Trn dt (Refund transaction date)*.

Update order history: The system writes a message to the Order History table for each order being refunded such as the following:

- *refund check:* `7/20/06 F Refund check# 212 created 49.50 EJOHNSON`
- *writeoff:* `7/20/06 F Refund type K has been cancelled 17.48- EJOHNSON`
- *credit card credit:* `7/20/06 F CC Crd for inv# 3918 processed 52.50 EJOHNSON`. If the credit card credit generates an email notification, the system also writes: `7/20/06 L C/C Ack to ejohnson@example.com.`
- *stored value card credit:* `5/27/06 F Stored Value Card refund created 12.99 KBROWN`

You can review Order History at the *Display Order History Screen*, available in standard order inquiry. This information is also available in streamlined order inquiry by selecting *History*.

Checks, registers, and acknowledgements: Depending on your selections, this job produces the:

- *Refund Check*
- *Refund Check Register*
- *Refund Writeoff Register*
- *Credit Card Credit Acknowledgment* (*Note:* The acknowledgment can also be sent by email; see *When Does the System Generate an Email Notification?*)
- *Credit Card Credit Register*
- *Stored Value Card Credit Register*

The system does not generate a register of canceled refunds.

ChannelAdvisor: See *Submitting Refunds for ChannelAdvisor Orders* for an overview of the refund process for ChannelAdvisor orders.

For more information: See *Refund Reports and Standard Programs*.

Refund Reports and Standard Programs

Purpose: The reports and print programs related to refunds, the standard program values, and the system control values you use to define them, are:

Report	Standard Program	System Control Value Name (Value)
Checks		
Refund Check	REFCHECK	*Refund Check Print Program (D23)* (program name)
Refund Check Register	CSR0385	
Writeoffs		
Refund Writeoff Register	CSR0390	
Credit Cards		
Credit Card Credit Acknowledgment	CSR0559	*Credit Card Credit Acknowledgment Print Program (D22)* (program name) *Print Credit Card Credit Acknowledgments (C35)* (Selected/Unselected)
Credit Card Credit Acknowledgement Email	CSR0258	*Credit Card Credit Acknowledgement E-Mail Program (H08)* (program name) **Note:** The *Print Credit Card Credit Acknowledgments (C35)* system control value does not control email acknowledgments.
Credit Card Credit Register	CSR0397	
Stored Value Card Register	CSR1405	

Reprint Refunds Screen (MREP)

Purpose: Use this screen when you encounter a problem printing refund checks or credits and you need to reprint them.

> **Note:**
>
> Because the reprint program uses information from the Check Reconciliation table, the reprint process picks up only unreconciled, unvoided checks within the check range you specify.

How to display this screen: Enter *MREP* in the Fast path field at the top of any menu or select this option from a menu.

Field	Description
Check # (Check number)	The check numbers of the first and last checks to reprint. *From* The check number of the first check to reprint. Numeric, 7 positions; optional. *To* The check number of the last check to reprint. Numeric, 7 positions; optional. *New #* Indicates whether to assign new check numbers to the reprinted checks/credits or use the same check numbers again. Valid values are: • *Selected* = Assign new check numbers. • *Unselected* (default) = Use the same check numbers again. The system does not reprint voided check numbers.
New # (New check number)	Indicates whether to assign a new check number to the reprinted check. Valid values are: • *Selected* = Assign a new check number • *Unselected* (default) = Use the same check number for the reprint.
Bank # (Bank)	The bank associated with the source code used on the orders. Bank codes are defined in and validated against the Bank table. See *Working with Banks (WBNK)*. Alphanumeric, 3 positions; required.

Completing this screen: If you select checks, a pop-up window appears displaying the next available check number. You can accept the check number, change the number, or select *Exit* to close the window and cancel the action. The system submits a batch job called *REF_RPRT*. This program reprints all the refunds you have specified. See *Refund Reports and Standard Programs*.

The system also writes a message to the Order History table that identifies the original check number, a reprint message, and the new check number, if applicable. You can view Order History through standard or streamlined order inquiry.

Reconciling Checks (MREC)

Purpose: Each refund check you print produces a record in the Refund Reconciliation table. You can use the Work with Check Reconciliation function to:

- reconcile refund checks that you receive back from the bank
- void refund checks in order to write them off
- void refund checks so that you can issue new refund checks
- unreconcile refund checks that were reconciled in error

In this topic:

- *Work with Check Reconciliation Screen*
- *Display Check Screen*
- *Reconciling and Unreconciling Checks*
- *Correcting Refund Check Errors*
- *Print Reconcile List Prompt Screen*
- *Check Reconciliation List*
- *Check Reconciliation List by Bank*

For more information: See *Purge Refund Checks Screen (MPRF)*.

Work with Check Reconciliation Screen

Purpose: Use this screen to display, reconcile, unreconcile, writeoff, void or reinstate refund checks. This screen lists all refund checks. Reconciled, voided and written off refunds remain on this screen until you use the Purge Refund Checks Screen (MPRF).

How to display this screen: Enter *MREC* in the Fast path field at the top of any menu or select Work with Check Reconciliation from a menu.

Field	Description
Bank	The bank associated with the source code on the order. You associate a source code with a bank through its division. If you process orders in multiple currencies, the bank indicates the currency of the refund check, since each currency on your system is associated with a unique bank. Bank codes are defined in and validated against the Bank table. See *Working with Banks (WBNK)*. Alphanumeric, 3 positions; optional.
Check number	The number of the refund check. Numeric, 7 positions; optional.
Chk Dt (Check date)	The date the system generated the refund check. Numeric, 6 positions (in user date format); optional.
Amount	The amount of the refund check. If you process orders in multiple currencies, this amount is in the currency used on the order. Numeric, 13 positions with a 2-place decimal; optional.
Recon (Date reconciled)	The date you reconciled the check. Reconciliation does not necessarily occur the same day you receive the check from the bank. Numeric, 6 positions (in user date format); optional.
Voided	The date you voided the refund check. Numeric, 6 positions (in user date format); optional.

Field	Description
Customer name	The name of the customer to receive the refund. Alphanumeric, 25 positions; display-only.

Screen Option	Procedure
Display a refund	Select *Display* for a refund to advance to the Display Check Screen.
Reconcile a refund check	Select *Reconcile* for the refund to reconcile the check. See Reconciling and Unreconciling Checks.
Unreconcile a refund	Select *Unreconcile* for the refund to unreconcile the check. See *Reconciling and Unreconciling Checks*.
Void/writeoff a refund	Select *Void/Write-off* for a refund to void/writeoff the refund. See Correcting Refund Check Errors.
Void/reinstate a refund	Select *Void/Reinstate* for a voided refund to reinstate the refund. See *Correcting Refund Check Errors*.
Display refunds by check date or by check number	Select *By Check Date* to display the refunds in ascending order by check date. Select *By Check Date* again to display refunds in ascending order by check number.
Reconcile by check or date range	Select *Batch Reconcile* to reconcile refunds by check or date range. See Reconciling and Unreconciling Checks.
Print a list of refunds	Select *Print List* to advance to the *Print Reconcile List Prompt Screen*.

Display Check Screen

Purpose: Use this screen to review the details of a refund check.

How to display this screen: At the *Work with Check Reconciliation Screen*, select *Display* for the check you want to review.

Field	Description
Check number	The number of the refund check. Numeric, 7 positions; display-only, assigned by the system.
Amount	The total dollar amount of the refund. If you take orders in multiple currencies, the amount is in the currency used on the order. Numeric, 20 positions with a 2-place decimal; display-only.
Date printed	The date you printed the refund check. Numeric, 6 positions (in user date format); display-only.
Date voided	The date you voided the refund check. Numeric, 6 positions (in user date format); display-only.
Date reconciled	The date you reconciled the refund check. Numeric, 6 positions (in user date format); display-only.

Field	Description
Received from bank	Indicates whether you have received the canceled refund check from the bank. Valid values are: 1. *selected* = You have received the check from the bank. 2. *unselected* = You have not received the check from the bank. The system updates this field to *selected* when you reconcile the check. See Reconciling and Unreconciling Checks.
Order number	The order that produced the refund. Numeric, 8 positions; display-only, assigned by the system.
Customer number	The number of the customer receiving the refund. Numeric, 9 positions; display-only, assigned by the system.
Customer name (Unlabeled field to the right of the customer number)	The name of the customer receiving the refund. Alphanumeric, 41 positions; display-only.
Bill to (Bill-to customer number)	The number of the bill-to customer associated with the order. Bill-to customer information appears only if there is a bill-to customer associated with the order. Numeric, 7 positions; display-only.
Bill-to customer name (Unlabeled field to the right of the bill-to customer number)	The name of the bill-to customer and company associated with the order. Alphanumeric, 42 positions; display-only.
Bank	The bank associated with the source code on the order. You associate a source code with a bank through its division. Bank codes are defined in and validated against the Bank table . See *Working with Banks (WBNK)*. If you process orders in multiple currencies, each currency on your system is associated with a unique bank. Alphanumeric, 3 positions; display-only.
Bank name (Unlabeled field to the right of the bank code)	The description associated with the bank. Alphanumeric, 30 positions; display-only.

Reconciling and Unreconciling Checks

Purpose: From the *Work with Check Reconciliation Screen*, you can reconcile individual canceled refund checks or you can reconcile a group (batch) of canceled checks by check number or by date range.

> **Note:**
>
> You cannot reconcile or unreconcile a voided check.

Reconcile a single check: Select *Reconcile* for the refund check. The current date appears in the Recon field to indicate that the check has been reconciled.

Unreconcile a single check: Select *Unreconcile* for a reconciled refund check that you want to unreconcile. The reconciled date disappears from the screen to indicate that the check is still unreconciled.

You cannot unreconcile a voided check.

Reconcile a batch of checks: Select *Batch Reconcile* to display the Batch Reconciliation pop-up window.

To reconcile a batch of canceled refund checks, enter the necessary information. You can:

- *Reconcile canceled checks by check number* by entering the first and last check numbers in the Starting check # and the Ending check # fields, or
- *Reconcile canceled checks by batch* by entering the first date and the final date of the checks in the Starting check date and Ending check date fields

Correcting Refund Check Errors

Void and writeoff a refund check: Select *Void/Write-off* for the refund at the *Work with Check Reconciliation Screen*.

When you accept the void/writeoff, the system:

- displays the void date
- voids the check record
- puts the refund in writeoff pending status so it can be written off the next time you process refunds
- writes a transaction message at the *Display Order History Screen*.

Void and reinstate: Select *Void/Reinstate* for the refund.

Using the void/reinstate option:

- places the refund on hold so that it won't be processed the next time you process refunds
- writes a transaction message at the *Display Order History Screen*, which you can view through standard Order Inquiry. This information is also available through streamlined Order Inquiry by selecting *History*.

Print Reconcile List Prompt Screen

Purpose: Use the *Check Reconciliation List* when reconciling refund checks against your account. You can include checks within a specific range of dates and also a specific bank; this may be useful if you are preparing a report for a specific accounting period.

How to display this screen: At the *Work with Check Reconciliation Screen*, select *Print List*.

Field	Description
Print unreconciled checks with a check date from and to	The first and last dates of the period for which you want to review unreconciled refund checks. Numeric, 6 positions (in user date format) each field; required if reconciled date range is not specified.
Print reconciled checks with a reconciled date from and to	The first and last dates of the period for which you want to review reconciled refund checks. Numeric, 6 positions (in user date format) each field; required if unreconciled date range is not specified.

To print the *Check Reconciliation List*, enter dates in each field for unreconciled, reconciled or both.

Purge Refund Checks Screen (MPRF)

Purpose: Use this screen to purge refund check records once you have reconciled or voided the checks.

How to display this screen: Enter *MPRF* in the Fast path field at the top of any menu or select Purge Refund Checks from a menu.

To purge checks, select *OK*. *Select* the confirmation prompt that appears at the bottom right corner of the screen to purge refund checks; otherwise, select *Exit* to return to a menu.

The system submits the *PURG_REFCHK* batch job, which purges all reconciled and voided refund checks. .

The system also produces the Check Reconciliation List. Although identical in layout to the *Check Reconciliation List*, this version of the list includes all voided and reconciled refund checks that have been purged by the Purge Refund Check program.

Printing the Processed Refund Register (PPRR)

Purpose: Use the Processed Refund Register to view a detailed listing of refunds processed, written off, or canceled within a selected date range. You can flag a refund for writeoff or cancellation in *Working with Refunds, Writeoffs and Balances Due (WREF)*. Once the refunds are flagged they can be processed in Process Refunds, provided they match the bank at the Process Refund screen.

This report includes detail information such as refund status, refund type, amount, customer name, and totals.

For more information:

- *Processing Refunds (MREF)*
- *Working with Refunds, Writeoffs and Balances Due (WREF)*

In this topic:

- *Processed Refund Register Screen*
- *Processed Refund Register*

Processed Refund Register Screen

Purpose: Use this screen to select the dates to include on the *Processed Refund Register* and to print the report.

How to display this screen: Enter *PPRR* in the Fast path field at the top of any menu or select Print Processed Refund Register from a menu.

Field	Description
Start date	The first date to include on the report. The system determines the information to include on the report based on the refund process date, not the create date of the refund. Numeric, 6 positions (in user date format); required.
End date	The last date to include on the report. Numeric, 6 positions (in user date format); required.

Instructions: Enter the date range in the start date and end date fields. Select *Accept* to submit your entries and generate the *Processed Refund Register*.

Processing Refunds by Order Number (MRFO)

Purpose: Use Process Refunds by Order Number to generate refunds for selected orders only. This option differs from *Processing Refunds (MREF)*; this option allows you to generate all available refunds by selected refund type for a specified bank, limiting the total dollar value of refunds if desired.

Which refunds are eligible? See *Processing Refunds (MREF)* for an overview of how the system determines which refunds to process, cancel, or write off.

ChannelAdvisor integration: You cannot generate refund notifications to ChannelAdvisor using Process Refunds by Order Number, and must use *Processing Refunds (MREF)* instead for these orders. See the *ChannelAdvisor Integration Overview*, including *Submitting Refunds for ChannelAdvisor Orders*, for background.

Process Refunds by Order Screen

Purpose: Use this screen to generate refunds for selected orders.

How to display this screen: Enter *MRFO* in the Fast path field at the top of any menu, or select Process Refunds by Order from a menu.

Field	Description
Bank	The bank associated with the source code on the order. You associate a bank with a source code by selecting a division for the source code; each division is associated with a bank. The system determines the next sequential check number to use by adding *1* to the Last check number defined in the Bank table. If you process orders in multiple currencies, the bank also indicates the currency of the refunds, since each currency on your system is associated with a unique bank. The bank you specify at this screen indicates the currency of all refund checks, credits, or writeoffs that you process at this screen. Bank codes are defined in and validated against the Bank table. See *Working with Banks (WBNK)*. Alphanumeric, 3 positions; required.
Orders	Enter each order number that should have a refund processed, canceled, or written off. The system verifies that there is a refund for each order that is eligible for processing; see below for details. Numeric, fifteen 8-position fields; required.

Completing this screen:

#	Step
1.	Enter the bank associated with the refund(s).
2.	Enter each order number to have a refund processed, canceled, or written off. Optionally, select *Work with Refunds* to advance to the Work with Refunds Screen to review refunds eligible for generation. **Note:** If you Select *OK* before entering any order numbers, you can enter any order number and Select *OK* again in order to exit the screen.
3.	Select *OK*. The system validates your entries and highlights any order numbers in error. Possible errors are:

Sample error message	Explanation
All refund records on hold for order 2464 1 of 3 refunds for order 2192 are on hold	The *Ref Sts (Refund status)* is held (*H*) or the *Manual hold* flag for the refund is *selected*.
Bank not valid for order 2465	The bank for the order is not the same as the *Bank* you entered.
Order 2605 not valid for processing	The *Ref Sts (Refund status)* is processed (*P*), canceled (*C*), or written off (*T*).
Order 3865 is not eligible for refund processing	The *Ord sts (Order status)* is held (*H*) or suspended (*S*).
No refunds exist for order 5845	There are no refunds for the order.

#	Step
4.	After correcting any errors, select *Submit*. If there are any refund checks to generate, a pop-up window appears displaying the next available check number. You can accept the check number displayed, change the check number, or select *Exit* to close the window and cancel the action.
5.	The system submits the job *REFORD_PRC*. This job processes the same updates and reports as the Processing Refunds (MREF) menu option; see Summary of Refund Processing Updates and Reports.

Working with Catalog Requests

In this part:

- *Entering Catalog Requests (WCAT)* shows you how to use the Catalog Request screens to create catalog requests for new and existing customers, and to change, delete, or display catalog request records.
- *Processing Catalog Requests (PCAT)* shows you how to use the Process Catalog Requests screen, discusses printing options, and shows you how to reset printed requests so that you can reprint labels, if needed.

- *Deleting All Printed Catalog Requests (DCAT)* discusses the screen you use to delete all printed catalog requests at one time.
- *Working with the Catalog Request Interface (WCRU)* discusses processing catalog requests you receive through an interface with Order Administration.

Entering Catalog Requests (WCAT)

Purpose: Use catalog requests to capture inquiries and manage requests for catalogs from new or existing customers. Creating catalog requests lets you track inquiry information, report on trends with respect to requests for specific catalogs, and quickly print labels in response to those requests.

You use the *Work with Catalog Requests Screen* when you want to create, change, delete, or display specific catalog requests or when you want to display or print a list of catalog customers whose names are still in the Catalog Request table.

> **Note:**
>
> You can also receive catalog requests through the catalog request interface. See *Working with the Catalog Request Interface (WCRU)*.

Catalog request history: The system tracks the total number of catalog requests by source code and date in the Catalog Request History table. This information is available for reporting purposes, such as on the Campaign Performance Report; see *Print Campaign Performance Reports (PCPR)* for more information. See *Catalog Request History Options* for additional menu options related to the Catalog Request History table.

Oracle Retail Customer Engagement customer integration: When you use the Oracle Retail Customer Engagement customer integration, if you create a customer through a catalog request, Order Administration sends the customer information to Oracle Retail Customer Engagement so that the customer records in the two systems are synchronized. See the *Customer Engagement Customer Integration* for more information.

E-Commerce Catalog Requests

The CWServiceIn web service allows an external system to post the E-Commerce Catalog Request Message (CWCatRequest) directly to Order Administration and receive responses without the need of any queues. My Oracle Support

- If the E-Commerce Catalog Request Message (CWCatRequest) passes validation, a catalog request record is created. See the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). You can review and change the catalog request at the *Work with Catalog Requests Screen*.
- If the *E-Commerce Catalog Request Message (CWCatRequest)* does not pass validation, a catalog request interface record is created. See the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). You can review and correct the catalog request through *Working with the Catalog Request Interface (WCRU)*.

Catalog request response: You can also send an E-Commerce Catalog Request Response Message (CWCatreqResponse) to the web storefront. See the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). The catalog request response message indicates the customer number used to create the catalog request. If the customer number in the catalog request response message is blank, the catalog request did not process correctly and needs to be corrected through *Working with the Catalog Request Interface (WCRU)*. **Note:** The e-commerce customer updates response message is available for XML messages only, not name/value pair messages.

The response_required field in the catalog request message indicates if a catalog request response message is sent to the web storefront.

- A value other than *Y* indicates a catalog request response message is not sent to the web storefront.
- *Y* indicates a catalog request response message is sent to the web storefront.

Customer updates: Additionally, if the customer associated with the catalog request does not exist, the system will create a new customer; see Customer Creation/Update Logic in E-Commerce Catalog Requests. In this case, it is useful to send a catalog request response message to the web storefront indicating the newly assigned customer number.

Oracle Retail Customer Engagement customer integration: When you use the Oracle Retail Customer Engagement customer integration, if you create a customer through an e-commerce catalog request, Order Administration sends the customer information to Oracle Retail Customer Engagement so that the customer records in the two systems are synchronized. See the *Customer Engagement Customer Integration* for more information.

See E-Commerce Catalog Requests in the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).for additional processing information.

In this topic:

- *Work with Catalog Requests Screen*
- *Catalog Request Creation Options*
- *Create Catalog Request Screen*
- *Select Customer for Catalog Request Screen*
- *Change Catalog Request Screen*
- *Ghost Customer Warning Window*

Work with Catalog Requests Screen

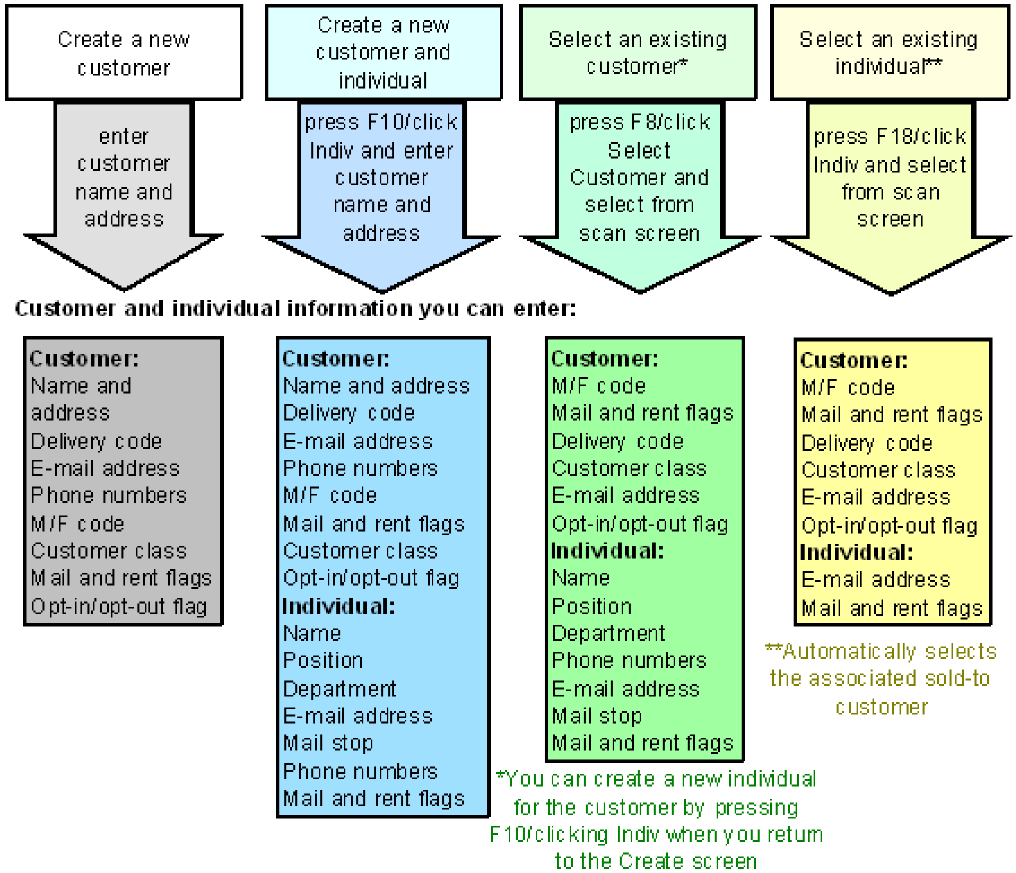
How to display this screen: Enter *WCAT* in the Fast path field at the top of any menu or select Work with Catalog Request from a menu.

Field	Description
Customer	A unique number the system assigns to each Sold-to customer on creation of the customer through Order Entry, Customer Maintenance, or catalog requests. **Ghost customers:** If you enter the customer number of a ghost customer, the scan screen does not display any catalog requests; this is because a merge/purge has assigned any catalog requests using that customer number to the “target” customer. You can identify a ghost customer by the setting of the *Ghost* flag. Numeric, 9 positions; optional.

Field	Description
Ofr (Offer)	Represents the advertising medium that you use to present merchandise to your customers. Your entry is validated against the Offer table. Alphanumeric, 3 positions; optional.
Source	A code that identifies a list of customers. The source code drives marketing, pricing, and freight information on an order. A source code will appear here only if a source code was entered when the catalog request was created. Alphanumeric, 9 positions; optional.
Request date	The date the catalog request was created. Numeric, 6 positions (in user date format); display-only.
Printed	A flag that indicates whether you have printed a catalog for the customer. *No* displays in this field next to a request until the catalog label is printed. Once the catalog label is printed, this value changes to *Yes*. Records remain on this list, regardless of their printed status, until you delete them selectively, or in batch mode. Values are: • *Yes* = A catalog label has been printed. • *No* = A catalog label has not been printed. Optional.

Screen Option	Procedure
Create a catalog request	Select *Create* to advance to the Create Catalog Request Screen.
Change a catalog request	Select *Change* for a catalog request to advance to the Change Catalog Request Screen.
Delete one or more catalog request records	Select *Delete* for a catalog request to display a pop-up window containing deletion options. You can delete a request using this method regardless of whether the label has been printed.
Display catalog request records	Select *Display* for a catalog request to advance to the Display Catalog Request Screen. You cannot change any information on this screen. See Change Catalog Request Screen for a sample screen and field descriptions.

Catalog Request Creation Options



E-commerce catalog requests: If the customer associated with an e-commerce catalog request does not exist, the system will create a new customer; see Customer Creation/Update Logic in E-Commerce Catalog Requests in the Order Administration Web Services Guide on My Oracle Support (ID 214914.1)

Ghost customers: If you enter the customer number of a ghost customer, the system displays the *Ghost Customer Warning Window*.

Create Catalog Request Screen

Purpose: Use this screen to create a catalog request for a new or existing customer.

How to display this screen: At the *Work with Catalog Requests Screen*, select *Create*.

> **Note:**
>
> You can also display this screen by selecting *Catalog Request* from the *Select Customer Sold To For Order Screen* or at the *Customer Selection Screen* in Order Entry.

> **Note:**
>
> If you are creating a catalog request for an existing customer, do not complete the following fields; instead, select *Select Customer* to select an existing customer, then complete the Offer, Item, Source, and # of copies fields. See *Catalog Request Creation Options* for an overview.

Ghost customers: If you enter the customer number of a ghost customer, the system displays the *Ghost Customer Warning Window*.

Field	Description
Name	The following five fields can hold the sold-to customer's full name: **Prefix** A title that belongs before the customer's name (such as "Mrs." or "Dr."). The prefix will print on labels. Alphanumeric, 3 positions; optional if you are creating a new customer, or display-only if you select an existing customer. **First Name** The customer's first name. Alphanumeric, 15 positions; optional if you are creating a new customer, or display-only if you select an existing customer. **Initial** The initial of the customer's middle name. Alphanumeric, 1 position; optional if you are creating a new customer, or display-only if you select an existing customer. **Last Name** The customer's last name. Alphanumeric, 25 positions; required if company name is not present and you are creating a new customer, or display-only if you select an existing customer. **Suffix** An addition to the customer's full name (such as "M.D.," "Fr.," or "III"). Alphanumeric, 3 positions, optional if you are creating a new customer, or display-only if you select an existing customer.
Company	The name of the company to which the catalog should be mailed, if applicable. Alphanumeric, 30 positions; required if last name is not present and you are creating a new customer, or display-only if you select an existing customer.
M/F (Male/ Female code)	A code that identifies the customer's gender. Alphanumeric, 1 position; optional.
Mail	This flag indicates whether the customer wants to receive future catalog mailings from your company. Not to be confused with the Mail code, a three-position, alphanumeric field. Valid values are: • *selected* = You can mail catalogs to this customer. • *unselected* = You can not mail catalogs to this customer. May default from the *Default Mail Name (D10)* system control value, but you can override it.

Field	Description
Rent	Indicates whether you can sell this customer's name to another company for their catalog mailings. Valid values are: • *selected* = You can sell this customer's name. • *unselected* = You can not sell this customer's name. May default from the *Default Rent Name (D11)* system control value, but you can override it.
Address	The customer's street address. This is the primary delivery address. **Shipping to a Post Office Box** To ship to a Post Office Box, enter `POST OFFICE BOX`, `POST BOX`, or any variation of `PO BOX` (with or without spaces or non-alphabet characters, such as `P.O. BOX`), and the box number in the customer's street address. During order processing, the system validates that the carrier can ship to a post office box (as defined in the Ship Via table). *Example:* Enter `P.O. Box 9999` in the Street field to indicate delivery to a post office box instead of a home or company address. **Note:** If you type `POST OFFICE BOX`, `POST BOX`, or any variation of `PO BOX` in the customer's street address during order entry or through the Order API, the system automatically selects the PO box field for the customer. However, if you remove this text from the customer's street address, the system does not automatically deselect the PO box flag. **Note:** When you create a customer outside of order processing, you need to select the PO box field manually. Alphanumeric, 32 positions; required if you are creating a new customer, or display-only if you select an existing customer.
Apt./suite	The apartment number or suite number of the delivery address. To enter an apartment or suite address: 1.Enter *APT* to indicate an apartment or *STE* to indicate a suite. 2.Insert a space and enter the number of the apartment or suite (for example, *APT 4* or *STE 116*). Field contents must conform to United States Parcel Service (USPS) address formatting Field Description standards. Always precede the apartment or suite number with the applicable abbreviation (such as APT or STE), to meet USPS regulations and correctly identify this information on labels or reports. Alphanumeric, 10 positions; optional if you are creating a new customer, or display-only if you select an existing customer.

Field	Description
Address lines 2-4 (Unlabeled fields directly beneath the street address)	Additional entry fields for the customer's address. The contents of address line 2 of the address must conform to United States Postal Service (USPS) formatting standards. For example, if the address represents a post office box, you must enter *P.O. Box* on this line to meet USPS regulations and correctly identify this information on labels. Alphanumeric, 30 positions; optional if you are creating a new customer, or display-only if you select an existing customer.
Postal code	The postal or zip code for this customer. Required only if the Require postal code? flag is selected for the country. See *Setting Up the Country Table (WCTY)* for background. If a postal code is required for the country, it is validated against the Zip/City/State (Postal Code) table; see *Setting Up the Zip/City/State (Postal Code) Table (WZIP)*. *Scan length:* The *Postal Code Scan Length (F61)* system control value controls how many characters of the postal code to use when searching for a customer. See that system control value for a discussion. **Note:** If postal codes have been entered into the Postal Code/City/State table, the postal code indicates the City and State to default. If you enter a valid postal code that does not correspond to the city or state you entered, the system changes the city or state information to correspond with the zip code you entered. Numeric, 10 positions; required or optional based on country if you are creating a new customer, or display-only if you select an existing customer.
City	The city where the customer lives, or receives mail or shipments. The system will complete this field for you when you enter a valid postal code if the postal code exists in the Postal Code/City/State table. Alphanumeric, 25 positions; required if you are creating a new customer, or display-only if you select an existing customer.
St (State)	The state or province where the customer lives, or receives mail or shipments. The system validates that the state you enter is assigned to the SCF in the first three positions of the postal code. State codes are defined in and validated against the State table, which is accessible through the Work with Countries menu option; see *Setting Up the Country Table (WCTY)*. Required only if the Require state? flag is selected for the country. The system completes the state field automatically when you enter a valid postal code if the postal code exists in the Postal Code/City/State table. Alphanumeric, 2 positions; required or optional based on country if you are creating a new customer, or display-only if you select an existing customer.
Country	The code for the customer's country. May default from the *Default Country for Customer Address (B17)* system control value; however, you can override it. Country codes are defined in and validated against the Country table. See *Setting Up the Country Table (WCTY)*. Alphanumeric, 3 positions; required if you are creating a new customer, or display-only if you select an existing customer.

Field	Description
Delivery code	This code identifies the address as a business or residential address. This code is used by shippers who charge different rates when shipping to a business or home. Valid values are: • *Business* • *No distinction* = Not valid for a UPS shipper • *Residential* This field may default based on the *Default Delivery Code for New Order Entry Customers (D13)* system control value, but you can override it. Required.
Customer class	A code that categorizes the consumer environment at a high level for reporting purposes. You can use a customer class code to: • direct offerings to a limited customer group • restrict item sales to a group of customers, for example, restricting the sale of guns to minors • set a default for bypassing item reservation for a group of customers • generate a list of customers for reporting purposes, or segment reports by class code *If you enter a new customer class code* in this field, the system updates the Customer Sold To table with the code you entered. *Required?* The *Require Customer Class in OE, WCAT, and WCST (H85)* system control value defines whether this field is required. *Secured?* The Maintenance of Customer Class Field (B07) secured feature defines whether you can enter or maintain the customer class field at this screen. **Note:** If the *Require Customer Class in OE, WCAT, and WCST (H85)* is *selected* and the customer does not have a customer class code assigned, a user who does not have authority based on the Maintenance of Customer Class Field (B07) secured feature will not be able to enter a catalog request. See *Setting Up the Customer Class Table (WCCL)* for information on working with customer classes. Numeric, 2 positions; optional.

Field	Description
Phone	The customer's daytime, evening, and fax or mobile telephone numbers. **Note:** The *Third Phone Number Type (L53)* system control value determines whether the third phone number is labeled the Fax or Mobile number. Alphanumeric, one 14-position field (phone number) and one 4-position field (phone extension); optional if you are creating a new customer, or display-only if you select an existing customer.
Email address	The customer's primary email address. This address, along with any other email addresses for the customer, is stored in the Customer Sold To Email table. A plus sign (+) indicates that there are additional email addresses on record for the customer. See *Email Address Validation* for information on how the system verifies that your entry is formatted correctly. **Entering a new email address:** If you overwrite the existing email address in this field, the system flags your entry as the primary email address for the customer, but retains the previous email address in the Customer Sold To Email table. In order to delete the previous email address, you need to prompt to display the *Select Customer Email Address Screen* and delete the previous email address there. See *Working with Customer Email Addresses* for an overview. **Deleting the email address:** Similar to entering a new email address, if you delete the email address from this field, the system removes the primary email flag for the address but retains the address in the Customer Sold To Email table. **Email notifications:** See *When Does the System Generate an Email Notification?* for an overview. Alphanumeric, 50 positions; optional.

Field	Description
Opt in	Determines the preferred method of correspondence for the sold-to customer email address. Valid values are: • *O1* (Email) = Email is the preferred method of correspondence. • *O2* (Order-only email) = Use email for order-related correspondence only; generate a document for other correspondence. • *O3* (No email) = Do not use email for any correspondence; generate a document instead. • *O4* (Do not ask the customer) = Do not ask the customer for his/her email address; the customer has already been asked and has declined to provide it. The system does not generate any email correspondence to the customer, even if an email address is specified. Defaults from the *Default Opt In/Opt Out Flag (G97)* system control value, but you can override it. **Note:** The above values use the letter O, not the number 0 (zero). The system updates this field when you change the setting of the Opt in/Opt out value at any other screen, such as order entry, order maintenance, or customer maintenance. **Email notifications:** See *When Does the System Generate an Email Notification?* for an overview. Alphanumeric, 2 positions; required.
# of copies	The number of catalogs the customer wants to receive; controls the number of labels printed when you use *Processing Catalog Requests (PCAT)*. For example, if you enter 5 here, the system prints 5 labels for the customer. If you do not have authority to the *Allow Number of Copies to Maintain in Catalog Request (A75)* secured feature, this field is display-only. **Tracking catalog request history:** When you print the catalog request label, the system uses the total number of requests rather than the total number of copies when tracking catalog request history in the Source Code table and in the Catalog Request History table. For example, if a customer requests 3 copies of a catalog, the system increases the total by 1, not by 3. You can review the total number of catalog requests for a source code at the *Source Code History Screen* and on the *Campaign Performance Report (PCPR)*. Numeric, 2 positions; required.

Field	Description
Source	A code that identifies a list of names for this catalog mailing. The source code drives marketing, pricing, and freight information on an order. **Note:** You can prompt to view a list of the source codes you can use. Only those source codes set to display in Order Entry and catalog requests appear in the Select Source pop-up window. The first source code you enter on this screen will default for any other catalog requests you create so you can enter them quickly. Once you exit this screen, the Source field will clear. The source code will default in the Source field for alternate address and standard address format. Source codes are defined in and validated against the Source Code table. See *Working with Source Codes (WSRC)*. Alphanumeric, 7 positions; required.
Offer	The code for the catalog that the customer is requesting. Offer codes are defined in and validated against the Offer table. See *Working with Offers (WOFR)*. The first offer code you enter on this screen will default for any other catalog requests you create so you can enter them quickly. This field clears when you exit the screen. The offer code will default in the Offer field for alternate address and standard address format. **Note:** You must enter an offer code or an item/SKU. Numeric, 3 positions; required unless you complete the Item field.
Item (Item number)	The code for the item you are sending to the customer with the catalog. Examples would be swatches of material or promotional items printed with your company name. Item numbers are defined in and validated against the Item table. See *Performing Initial Item Entry (MITM)*. Alphanumeric, 12 positions; optional.
SKUs	A code for the style of the item, such as its color or size. Alphanumeric, three 4-position fields; required if entering an item that has SKUs.

Catalog Request Customer Updates

When you create a new customer here, the system creates the new customer in the Customer Sold To table. The current and original mail type fields are set to *C* (catalog request). If the *Track Customer History at Entity Level (F89)* system control value is *selected*, the system also creates a Customer Entity record for the entity associated with the source code.

Oracle Retail Customer Engagement customer integration: If the *ORCE Customer Integration (L37)* system control value is set to *INTERACT*, when you create a new customer at this screen, the customer is also created in Oracle Retail Customer Engagement, and the two customer records are synchronized. See the *Customer Engagement Customer Integration* for more information.

If you select an existing customer and change the value of an existing field, such as the Opt in/opt out field or the Customer class, the system updates the customer table. See *Creating and Updating Sold-to Customers (WCST)*.

When the catalog request label is printed, the Customer Mail History table is updated through the catalog request. The Original source field is updated if you added a new customer. See *First Create Sold To Customer Screen*.

If the customer you enter already exists: The system displays the Duplicate Customer window if the customer information you enter matches an existing customer in the Sold To Customer table. The system displays this window based on match code.

You can use the existing customer information and cancel the creation of the new customer, or you can override this message and create the additional customer. You might use the duplicate customer information, for example, if two different people with the same name, such as John Smith, live at addresses that are so similar that the system thinks they are the same person.

If the customer's catalog request already exists: The system displays the Display Duplicate Sold To pop-up window if the customer and offer/item information you enter at the *Create Catalog Request Screen* matches an existing customer sold to, based on match code. A match code is made up of parts of the customers name, address, and postal code. The match code is a user-defined code defined in the Match Code table; See *Setting Up Match Codes (MMCH)*.

> **Note:**
>
> If you do not set up a match code in the Match Code table, the system displays the first sold to customer, based on sold to customer number, as a duplicate each time you enter a new address.

Duplicate catalog requests: The system uses the *Edit for Duplicate Catalog Requests (E46)* system control value to update duplicate catalog requests. If this value is *selected*, the system checks for a duplicate when you create a new catalog request; if there is a match, the system replaces the existing request with the new one. If this value is *unselected*, the system creates a new catalog request without checking the existing records.

When you print the catalog request label, the system uses the total number of requests rather than the total number of copies when tracking catalog request history in the Source Code table and in the Catalog Request History table. For example, if a customer requests 3 copies of a catalog, the system increases the total by 1, not by 3. You can review the total number of catalog requests for a source code at the *Source Code History Screen* and on the *Campaign Performance Report (PCPR)*.

Screen Option	Procedure
Enter a catalog request for a new customer	Complete the fields as described under *Create Catalog Request Screen*. See *Catalog Request Creation Options* for an overview.

Screen Option	Procedure
Select an existing customer	Select *Customer* to advance to the *Select Customer for Catalog Request Screen*. See *Catalog Request Creation Options* for an overview. **Note:** If the *ORCE Customer Integration (L37)* system control value is set to *INTERACT*, you advance instead to the *Customer Scan Screen*. See that screen for more information.
Work with products a customer owns	Select *Cust Ownership*. • If the customer is currently associated with customer ownership records, you advance to the *Work with Customer Ownership Screen*. • If the customer is currently not associated with customer ownership records, you advance to the *Create Customer Ownership Screen*.
Add notes for the customer	Select *Notes* to advance to the *Edit Customer Notes Screen*.

Select Customer for Catalog Request Screen

Purpose: In addition to creating catalog requests for people who are not yet customers, you can also create catalog requests for existing customers from the *Create Catalog Request Screen*.

When creating a catalog request for an existing customer, the system copies customer information from the Sold To Customer directly into the catalog request. See *Catalog Request Creation Options* for an overview.

How to display this screen: At the *Create Catalog Request Screen*, select *Select Customer*.

> **Note:**
>
> If the *ORCE Customer Integration (L37)* system control value is set to *INTERACT*, you advance instead to the v. See that screen for more information.

How to use this screen: Use this screen to advance to scan screens that let you locate existing customer records. If the customer exists, you can select the customer and the system will copy information from the customer into the customer fields on the *Create Catalog Request Screen*.

Field	Description
Customer	A unique number the system assigns to each customer on creation of the customer through Order Entry, Customer Maintenance, or catalog requests. **Ghost customers:** If you enter the customer number of a ghost customer, the system displays the *Ghost Customer Warning Window*. Numeric, 9 positions; optional.
Postal code	The postal or zip code that identifies the customer's geographic location. Enter a full or partial code to advance to the Scan Sold To by Postal Code/Company screen. This screen lists all customers by postal code in ascending (lowest to highest) numeric sequence, beginning with the code you entered. If you enter a postal code, last name, and first name, you advance to the Scan Customer Sold To by Postal Code screen, which lists all customers alphabetically beginning with the postal code you entered. Alphanumeric, 10 positions; optional.
Last name	The sold-to customer's last name. Enter a last name, first name, and postal code to advance to the Scan Customer by Postal Code/Last Name screen, positioned to the customer with the last name, first name, and postal code you entered. Enter a full or partial name to advance to a Scan Cust Sold To By Last Name screen, which lists all customers alphabetically beginning with the name you entered. You can also include a full or partial first name along with a full (not partial) last name to restrict the scan further. Alphanumeric, 25 positions; optional.
First name	The sold-to customer's first name. Enter the last name, first name, and postal code to advance to the Scan Customer Sold To by Postal Code screen, which lists all customers alphabetically beginning with the postal code you entered. You can also enter just the full (not partial) last name and full or partial first name to advance to the Scan Cust Sold To By Last Name screen. **Note:** First name must be used in conjunction with Postal code, Last name for scanning. You cannot scan on first name alone, or on first name, last name. Alphanumeric, 15 positions; optional.
Company	The name of the company placing the catalog request. Alphanumeric, 30 positions; optional.

Field	Description
Telephone #	The customer's daytime, evening, or third (fax or mobile) telephone number. **Note:** The *Third Phone Number Type (L53)* system control value determines whether the third phone number is labeled the Fax or Mobile number. **Note:** Your entry should include any formatting specified by the telephone number format for the country; for example, if the telephone number format for the United States is `(111) 111-111`, your entry should include the parentheses and hyphen. See Setting Up the Country Table (WCTY), for more information on telephone number formats by country. Alphanumeric, 14 positions; optional.
Alternate customer number	A number to identify the customer, such as an old customer number from a system conversion. Enter an alternate customer number to advance to a subsequent scan screen that lists customers by alternate customer number. *Display Alternate Customer Cross Reference Window (I84)* for more information. **Alternate Customer Number Label Description** The field label on this screen is based on the name you enter in the *Alternate Customer Number Label Description (H95)* system control value; if you do not enter a name in this system control value, the field label is Alt cust. *Example:* If you enter the field label name *MEMBER#* in the system control value, the field label on this screen is MEMBER#. **Note:** Scanning by the alternate customer number of a ghost customer is not currently implemented if the *Display Alternate Customer Cross Reference Window (I84)* system control value is *selected*. Alphanumeric, 15 positions; optional.

Field	Description
Email Address	An email address for the customer. When you enter a full or partial email address, you advance to the Scan Customer by Email Address screen, where you can scan by any email address on file for a customer. This field is not case sensitive; an email address of *abc@example.com* matches an entry of *ABC@EXAMPLE.COM*, and vice versa. Alphanumeric, 30 positions; optional.

Option	Procedure
Select a customer for a catalog request	Click a customer name to return to the *Create Catalog Request Screen* with that customer's name and address defaulted.
Change a customer's name and address information	Select *Change* for a customer to advance to the *Change Cust Sold to Name & Address Screen*.
Display a customer's name and address information	Select *Display* for a customer to advance to the Display Customer Sold To screen. See the See the *First Create Sold To Customer Screen* for field descriptions.
Create a catalog request for a new customer	Select *Create* to return to the *Create Catalog Request Screen* without selecting a customer.

Ghost Customer Warning Window

A ghost customer is a customer whose records have been merged with the records of a matching customer through a merge/purge. The ghost customer was the source customer in the merge; records for this customer were merged with the records for a matching target customer. When performing the merge you can elect to flag a source customer as a *Ghost*. Ghost customer records are retained in the Customer Sold To table for informational purposes, but they do not represent the most recent customer order information from the merged (target customer) records.

When you enter the number of a ghost customer, the pop-up Warning Window presents the information on the ghost customer and target.

Select *Continue* to advance to the *Create Catalog Request Screen* with the target customer number entered on the screen. For example, if you enter *202*, a ghost customer, the system will display this window informing you that customer *202* has been merged into customer *137*. When you continue with the catalog request process, customer *137* will default on the Create Catalog Request screen.

> **Note:**
>
> The Ghost Customer Warning pop-up window does not display when you use the *Customer Selection Screen*.

See *Working with Merge/Purge Sold-to Names (MMCS)* for more information on the merge/purge function.

Canceling the creation: Once you select a customer from the *Select Customer for Catalog Request Screen*, you return to the *Create Catalog Request Screen*, which displays the information from the request you selected. If, on review, you learn that the customer information is incorrect, you can remove it from the screen without creating a catalog request.

Select *Create* to erase the selected customer information from the *Create Catalog Request Screen*. The system clears your entries and you can begin again.

Change Catalog Request Screen

Purpose: Use this screen to change the offer number, item number, SKU, source code, or the number of copies for a catalog request.

How to display this screen: At the *Work with Catalog Requests Screen*, select *Change* for a catalog request.

Additional fields at this screen:

Field	Description
Printed	A code that identifies whether the catalog mailing label has been printed for a catalog request. The system updates this value when you process the catalog requests; see *Processing Catalog Requests (PCAT)*. If you deselect this flag after the catalog request label is printed, the system decreases the Requests mailed total for the source code. Once you print the label again, the system increases the total again. You can review this total at the *Source Code History Screen* and on the *Campaign Performance Report (PCPR)* Values are: *selected* = The catalog label has been printed. *unselected* = The catalog label has not been printed.
Date printed	The date the catalog label was printed. Numeric, 6 positions (in user date format); display-only.
Catalog requested on	The date and time of the catalog request. Date: numeric, 6 positions (in user date format); updated by the system. Time: numeric, 6 positions; HHMMSS (hour/hour, minute/minute, second/second) format, updated by the system.
Catalog requested by	The name of the system user who entered or processed the catalog request. Alphanumeric, 10 positions; display-only.

See *Create Catalog Request Screen* for a description of the other fields on this screen.

> **Note:**
>
> Changing a catalog request from one source code to another does not affect the total quantity for each source code tracked in the Catalog Request History file, or tracked on reports such as the Campaign Performance Report (see *Print Campaign Performance Reports (PCPR)* for more information).

Processing Catalog Requests (PCAT)

Purpose: Once you have created catalog requests, you process them by printing the catalog mailing labels. You can format the labels in rows of two or three addresses each.

Reprint: You can reprint catalog requests if the labels become jammed in the printer by using the *Reset Printed Catalog Request Screen (RCAT)* and then the *Process Catalog Requests Screen (PCAT)*.

Related system control values: Use the *Label 2-Up Printing Program (C83)* and *Label 3-Up Printing Program (C84)* system control values to specify which program to use when printing catalog request labels.

History updates: When you print catalog request mailing labels, the system updates:

- Customer mail history: see *Display Customer Mail History Screen*
- Last source and Last mail date in customer order history: see *Display Customer Order History Screen*
- Source code: see the *Source Code History Screen*
- Catalog request history: see the *Campaign Performance Report (PCPR)*

> **Note:**
>
> You cannot print catalog requests if another person has submitted the job and it is currently running.

In this topic:

- *Process Catalog Requests Screen (PCAT)*
- *Catalog Mailing Labels (MSR0613 or MSR0614)*
- *Labels Printed by Item Report*
- *Labels Printed by Source Report*
- *Labels Printed by Zip Report*

For more information: See *Reset Printed Catalog Request Screen (RCAT)*.

Process Catalog Requests Screen (PCAT)

Purpose: At this screen you can print labels for the catalogs you want to mail. You can:

- print directly to a printer
- specify the number of labels to print
- print labels for selected source codes and/or items

> **Note:**
>
> For best results, do not select the Shrink to Fit option when printing labels.

How to display this screen: Enter *PCAT* in the Fast path field on any menu screen or select Process Catalog Requests from a menu.

Field	Description
Number of labels ready to print	The number of catalog mailing labels eligible to be printed for catalog requests. The number of unprinted catalog requests appears here. Represents the total number of copies requested for the catalogs if a customer requested multiple copies. Numeric, 5 positions; display-only.
Nbr of labels to print (Number of labels to print)	The number of labels that you want to print. This field defaults to the same number as in the Nbr of labels ready to print field, but you can override it. Numeric, 5 positions; required.
Select source codes	Use this field if you want to print catalog mailing labels only for one or more specific source codes. Selecting multiple source codes: *Click* on the arrow in this field to advance to the Select Multiple Sources screen. At this screen, you can select a source by *Selecting* it. You can deselect a source by selecting *Deselect* for it. Select *Exit* to return to the Process Catalog Requests screen. If you have selected more than one source code, (MULTIPLE SELECTED) appears to the right of this field. Leave this field blank to select all eligible catalog requests regardless of source code. Alphanumeric, 9 positions; optional.
Select items	Use this field if you want to print catalog mailing labels only for one or more specific items. You can identify an item, such as a promotional item with your company's logo or a swatch of material that should be sent along with the catalog. If an item is specified with a catalog request, the item code prints on the catalog mailing label. Selecting multiple items: *click* on the arrow in this field to advance to the Select Multiple Items screen. At this screen, you can select an item by *Selecting* it. You can deselect an item by *Deselecting* it. Select *Exit* to return to the Process Catalog Requests screen. If you have selected more than one source code, (MULTIPLE SELECTED) appears to the right of this field. Leave this field blank to select all eligible catalog requests regardless of item. Alphanumeric, 12 positions; optional.
Print option	The code to print the catalog mailing labels. *Printer* indicates the mailing labels will be printed on a printer. Required.

Field	Description
Label type	Controls how many labels to print in a row. Valid values are: • *2 up* = print 2 labels per line. • *3 up* = print 3 labels per line. The *Label 2-Up Printing Program (C83)* and *Label 3-Up Printing Program (C84)* system control values specify which formats to use when printing labels. Required if Print option field is set to Printer.
Sort labels	Identifies how to sorts the catalog mailing labels. Valid values are: • *Zip* = Sort labels alphanumerically by postal code (zip code). Labels print in ascending (lowest-to-highest) customer number sequence. Catalog requests that do not contain item information print first. See *Labels Printed by Zip Report*. • *Source* = Sort labels alphanumerically by source code. Labels print in ascending (lowest-to-highest) customer number sequence. See *Labels Printed by Source Report* • *Item* = Sort labels alphanumerically by item. Labels print in ascending (lowest-to-highest) zip code (postal code) sequence. See *Labels Printed by Item Report* Required if Print option field is set to Printer.
Delete request	Controls whether to delete all catalog requests whose Printed fields are *selected*, regardless of whether these records were included in the current print job. *Example:* If you entered *20* in the Nbr of labels to print field, but there are additional printed catalog requests in the Catalog Request table, the system will delete the requests you included in your current print number plus every catalog request whose Printed field is *selected*. Valid values are: • *Selected* = Delete all printed catalog requests. • *Unselected* (default) = Do not delete printed catalog requests.

Screen Option	Procedure
Display the *Work with Catalog Requests Screen*	Select *W/W Requests*.

Reset Printed Catalog Request Screen (RCAT)

Purpose: Use the Reset Printed Catalog Requests function to change the status of all printed request records to "unprinted." This reset might be useful if there is a problem with the catalog mailing labels you just printed, such as if the labels jammed when printing.

This screen displays the number of printed catalog requests that will be reset.

How to display this screen: Enter *RCAT* in the Fast path field at the top of any menu, or select Reset Printed Catalog Requests from a menu.

Reset all printed catalog requests: Select *OK* without entering a date range to reset the status of all printed catalog requests from *selected* to *unselected* to make them eligible for reprinting. Optionally, you can also select a company (by number) to reset catalog requests in a different company; your current company defaults.

Reset specific catalog requests:

- Enter a date range to reset the status of all catalog requests printed within the dates you specify. Optionally, you can select a company (by number) to reset catalog requests in a different company; your current company defaults.
- Select *Work with Requests* to advance to the *Work with Catalog Requests Screen*, where you can review printed requests before you reset the print status of all printed catalog requests. From this screen, you can also select *Change* for a catalog request to advance to the *Change Catalog Request Screen*, where you can reset the Printed field for a specific request.

Screen Option	Procedure
Advance to the *Work with Catalog Requests Screen*	Select *Work with Requests*.

Deleting All Printed Catalog Requests (DCAT)

Purpose: Once you have created and printed catalog requests, you can delete them individually or as a group.

Delete Printed Catalog Requests Screen

How to display this screen: Enter *DCAT* in the Fast path field on any menu or select Delete Printed Catalog Requests from a menu.

To delete printed catalog requests: Enter a date range to delete catalog request records printed within the dates you specify. Optionally, you can also enter a company (by number) to delete catalog requests in a different company; your current company defaults.

To delete all printed catalog requests: Select *OK* at this screen without entering a date range to delete all printed Catalog Request records.

> **Note:**
>
> You cannot reprint deleted catalog request records.

Review printed catalog requests: Select *Work with Requests* to advance to the *Work with Catalog Requests Screen*, where you can view printed requests to verify the global deletion.

For more information: *Entering Catalog Requests (WCAT)* and *Processing Catalog Requests (PCAT)*.

Working with the Catalog Request Interface (WCRU)

Purpose: Use the Work with Catalog Request menu option to review the records that have been uploaded to the Catalog Request Interface table (IXCRIN), to correct any errors, and to generate catalog requests from the interface records. You might use the Catalog Request Interface table as a means to collect catalog requests you receive from various sources, and make sure that you have complete information for each of them before you attempt to create the catalog requests in Order Administration.

The catalog request interface also creates new customer sold to records, and you can use the interface to create a customer record without actually processing a catalog request.

Use the following steps to create a catalog request from an external system.

#	Step
1	Create a text file that contains the records to upload to the Catalog Request Interface table. You can use the sample data below to create records in the upload text file. `34 SAMPLE STREET|APT123|ADDRESS LINE 2|ADDRESS LINE 3|ADDRESS LINE 4|WESTBOROUGH|01581||MA|US|5085550100||thomasbrown@example.com|O1|R|COMPANY NAME|SOURCE7|7|1150417|207|5085550101||5085550102||MS.|MARY|M|JOHNSON||MARYJOHNSON@EXAMPLE.COM||5085550104|5085550105|5085550106|1|1|O1` **Note:** If you wish to leave any field in the upload file blank, pass a space in an alphanumeric field and a 0 in a numeric field so that the file can be processed without errors. Leaving a field with no space or 0 is interpreted as null in the database and causes errors.
2	Populate the Catalog Request Interface table by: • Using the *File Storage API* to upload the contents of the file in the FILE_STORAGE table, and then run the *UPCATRQ Upload Catalog Request File* (Program name *PFR0134*, Parameter *IXCRIN*) periodic function, or • Use the *Work with File Uploads (WUPL)* menu option to upload the file and populate the table.
3	Select *Submit* at the *Work with Catalog Request Interface Screen* to process the requests. When you process: • Each valid record is deleted from the interface table, and a customer sold to and/or catalog request is created as appropriate. Also, the Catalog Request History table is updated. • Each invalid record is flagged with an error *(E)* status. You can use the *Change Catalog Request Screen* to correct errors. • The *Print Request Interface Report* and the *Print Catalog Request Interface Errors Report* are generated.
4	Once the catalog requests are generated, you can process and print them like any other requests. See *Entering Catalog Requests (WCAT)*.

E-Commerce catalog requests: You can use this menu option to review and correct catalog requests received through the e-commerce catalog request process that are in error. If a catalog request received through the e-commerce catalog request process does not contain errors, you can review and process the catalog request using the Work with Catalog Requests menu option; see *Entering Catalog Requests (WCAT)*.

> **Note:**
>
> If you receive a catalog request from e-commerce that has errors, and customer ownership information has been defined for the sold to customer on the catalog request, the system does not retain the customer ownership information when you correct the errors and reprocess the catalog request.

Oracle Retail Customer Engagement customer integration: When you use the Oracle Retail Customer Engagement customer integration, if you create a customer through the catalog request interface, Order Administration sends the customer's name, address, email address, phone numbers, and contact permissions to Oracle Retail Customer Engagement so that the customer records in the two systems are synchronized. See the *Customer Engagement Customer Integration* for more information.

In this topic:

- *Work with Catalog Request Interface Screen*
- *Change Catalog Request Screen*
- *Processing Requests*
- *Catalog Request Interface Errors*
- *Catalog Request Related System Control Values*
- *Creating a New Customer*
- *Print Request Interface Report*
- *Print Catalog Request Interface Errors Report*

Work with Catalog Request Interface Screen

How to display this screen: Enter *WCRU* in the Fast path field on any menu or select Work with Catalog Request Interface from a menu.

Field	Description
Type	Indicates the source of the catalog request. **Note:** If this field is blank, the catalog request is in error status and you cannot change it through this menu option. You need to delete the record and recreate it, either by populating the Catalog Request Interface table directly or by entering the catalog request through *Entering Catalog Requests (WCAT)*. *E-Commerce catalog requests:* Catalog requests received through the e-commerce catalog request process have a type of *PHR0062*. Alphanumeric, 10 positions; optional.
Source	The source code assigned to the catalog request, indicating how the customer came to contact you. If the source code is not specified in the Catalog Request Interface table, the system assigns the *Default Source Code for Batch Catalog Requests (D37)* system control value when you select *Submit* to submit the interface records for processing. Alphanumeric, 9 positions; optional.
Name	The customer's last and first names, separated by a column. Last name: alphanumeric, 25 positions; display-only. First name: alphanumeric, 15 positions; display-only.
Date	The date specified in the Catalog Request Interface table indicating when the request was received. Numeric, 6 positions (in user date format); optional.
St (Status)	Indicates the current status of the catalog request. Valid values are: • *E* = One or more errors are preventing the interface record from being processed. You must correct the record before you resubmit the records for processing. However, if the Type field is not populated, you cannot correct the record; you need to delete it and recreate it. • *P* = The *CATALOGREQ* job is currently running; you cannot work with the record until this job is complete. • blank = The record is currently open. When you select *Submit* to submit the interface records for processing, the *CATALOGREQ* job evaluates the record for errors and, if it is error-free, the job performs the processing described Processing Requests Alphanumeric, 1 position; optional.

Screen Option	Procedure
Change a catalog request interface record	Select *Change* for a record to advance to the *Change Catalog Request Screen*.
Delete a catalog request interface record	Select *Delete* for a record to delete it.
Display a catalog request interface record	Select *Display* for a record to advance to the *Display Catalog Request Screen*.
Submit the catalog request records for processing	Select *Submit*. See *Processing Requests*.

Change Catalog Request Screen

Purpose: Use this screen to change a record in the Catalog Request Interface table and to correct errors. When you select *OK*, the system validates the entries on the screen and highlights the field that contains an error.

Once you correct the errors on this screen, the record's status changes from *E* to blank, and it is eligible for processing.

How to display this screen: Select *Change* for a catalog request record at the *Work with Catalog Request Interface Screen*.

> **Note:**
>
> If the Type field for the catalog request record is blank, you advance first to a key screen and you cannot correct any other errors for the record. You need to delete the record and recreate it (for example, using *Entering Catalog Requests (WCAT)*).

Field	Description
Name	The following fields are available for the customer's full name: *Prefix* A title (such as “Mrs.” or “Dr.”) that precedes the customer's name. The prefix prints on labels, reports, etc. Alphanumeric, 3 positions; optional. *First Name* The Sold-to customer's first name Alphanumeric, 15 positions; optional. *Initial* The initial of the customer's middle name. Alphanumeric, 1 position; optional. *Last Name* The customer's last name. Alphanumeric, 25 positions; required if company name is not specified. *Suffix* An addition to the customer's full name (such as “M.D.,” “Fr.,” or “III”). The suffix prints on labels, reports, etc., but is not accessible to scans. *Errors:* The record is in error status if both the last name and the company field are blank. Alphanumeric, 3 positions, optional.
Company	The name of the company associated with the customer placing the order. *Errors:* The record is in error status if both the last name and the company field are blank. Alphanumeric, 30 positions; required if last name is not specified.
Street	The customer's street address. This is the primary delivery address. *Errors:* The record is in error status if this field is blank. Alphanumeric, 32 positions; required.
Apt./suite (Apartment/suite)	The apartment number or suite number associated with the customer's delivery address. Follow these steps to enter an apartment or suite address: • Enter *APT* to indicate an apartment or *STE* to indicate a suite. • Insert a space and enter the number of the apartment or suite, for example: *APT 4* or *STE 116*. Addresses must conform to United States Parcel Service (USPS) address formatting field description standards. For example, always precede the apartment or suite number with the appropriate abbreviation (for example, APT or STE). Alphanumeric, 10 positions; optional.
Address	Three additional lines of the customer's delivery address. If the address represents a post office box, you must enter *P.O. Box* on the first line to meet USPS delivery regulations. Alphanumeric, three 30-position lines; optional.

Field	Description
Postal code	The postal or zip code for this customer. This code represents a delivery area. *Required?* A postal code is required only if the Require postal code? flag for the country is selected; see *Setting Up the Country Table (WCTY)*. *Postal code validation:* If a postal code is required, it is validated against the Zip/City/State (Postal Code) table; see *Setting Up the Zip/City/State (Postal Code) Table (WZIP)*. *Errors:* The record is in error status if the Require postal code? flag for the country is selected and the SCF of the postal code is blank or invalid, or if the postal code does not match the state. See *Catalog Request Interface Errors*. Alphanumeric, 10 positions; required or optional based on country.
City	The city where the customer lives or receives mail or shipments. Alphanumeric, 25 positions; required.
St (State)	The state or province where the customer lives or receives mail or shipments. *Defined where?* State codes are defined in and validated against the State table, accessible through the Work with Countries menu option; see *Setting Up the Country Table (WCTY)*. *Required?* A state is required only if the Require state? flag for country is selected. See *Setting Up the Country Table (WCTY)*. *SCF validation:* If the Require postal? flag for the country is selected, the system validates that the state you enter is assigned to the SCF associated with the postal code. See *Working with SCF Codes (WSCF)* for background. *Errors:* The record is in error status if the Require state? flag for country is selected and there is not a valid state code. State codes must be in uppercase. Alphanumeric, 2 positions; required or optional based on country.
Country	The code for the customer's country. Country codes are defined in and validated against the Country table. The *Default Country for Customer Address (B17)* system control value defaults here when you submit the catalog request for processing if the country code was not already specified for the record. *Errors:* The record is in error status if there is not a valid country code. Country codes must be in uppercase. See *Setting Up the Country Table (WCTY)*. Alphanumeric, 3 positions; required.

Field	Description
Delivery code	Identifies a business (commercial) or residential address. Used to calculate shipping charges for shippers that use rate tables (such as U.P.S.). • *Business* = Business rate table determines shipping charges. • *Residential* = Residential rate table determines shipping charges. • *No distinction* = No distinction between business and residence. *Errors:* The record is in error if the delivery code is blank or invalid. Delivery codes must be in uppercase. Required.
Phone numbers	The customer's day, evening, and third (fax or mobile) phone numbers. **Note:** The *Third Phone Number Type (L53)* system control value determines whether the third phone number is labeled the Fax or Mobile number. Alphanumeric, 14 positions each; optional.
Ext (Extension)	The extension of the customer's day, evening, and third (fax or mobile) phone number. **Note:** The extension for the third phone number is not updated through the catalog request upload process. Numeric, 4 positions; optional.
Email address	The customer's email address. Alphanumeric, 30 positions; optional.

Field	Description
OptIn (Opt in/opt out)	Indicates the preferred method of correspondence for the customer email address. Valid values are: • *All Emails* = Email is the preferred method of correspondence. • *Order Emails Only* = Use email for order-related correspondence only; generate a document for other correspondence. • *No Emails* = Do not use email for any correspondence; generate a document instead. • *Do Not Ask* = Do not ask the customer for his/her email address; the customer has already been asked and has declined to provide it. The system does not generate any email correspondence to the customer, even if an email address is specified. Defaults from the Opt in/opt out field for the sold-to customer, and if blank, defaults from the *Default Opt In/Opt Out Flag (G97)* system control value, but you can override it. **Note:** The above value uses the letter O, not the number 0 (zero). Required.
Create catalog request?	Indicates whether to create a catalog request. Valid values are: • *selected* = Create a catalog request. • *unselected* = Do not create a catalog request. Regardless of the setting in this field, the system may still create a new customer sold to; see the Perform duplicate check field. *Errors:* The record is in error status if this field is not set to a valid value.
Perform duplicate check?	Indicates whether to perform a match code check to determine whether the catalog request represents a new customer. Valid values are: • *selected* = Perform a duplicate check based on match code. If the catalog request matches an existing customer based on match code, do not create a new customer; use the existing customer record without updating it. If more than one existing customer has the same match code, use the first match. • *unselected* = Do not perform a duplicate check based on match code; create a new customer record using the information in the catalog request. *Errors:* The record is in error status if this field is not set to a valid value. See *Setting Up Match Codes (MMCH)* for more information on match codes and duplicate checking.

Field	Description
File type	Indicates the source of the catalog request. This information is not validated against any tables in Order Administration. *Errors:* The record is in error status if this field is blank. In this case, you cannot correct the record at this screen; instead, you can delete the record and recreate it, or update the table directly. Alphanumeric, 10 positions; display-only.
Request date	The date when you received the request. The system does not update this field. If a date was indicated in the catalog request interface record, it appears here; however, you can change it. Numeric, 6 positions (in user date format); optional.
Source	A code that identifies a list of names for this catalog mailing. The source code drives marketing, pricing, and freight information on an order. *Overrides:* When you submit the requests for processing, the system assigns the *Default Source Code for Batch Catalog Requests (D37)*system control value if a valid source is not specified for the catalog request. In this situation, the offer for the record is reset, if necessary, to match the default source code. Source codes are defined in and validated against the Source Code table. See Working with Source Codes (WSRC). Alphanumeric, 9 positions; required.
Offer	The code for the catalog that the customer is requesting. *Overrides:* The system defaults or overrides the offer in the catalog request record when you submit the requests for processing so that it matches the source code. If the offer is not specified, the job defaults the offer associated with the source code. If the offer does not match the source code, the job replaces this offer with the offer associated with the source code. *Errors:* The record is in error status if both source code and offer are blank when you submit the records for processing. However, the record is corrected the next time you submit records for processing. The reason this correction occurs is that, the first time you submit the records, the job sets the source code field to the *Default Source Code for Batch Catalog Requests (D37)* The second time you submit the records, the job updates the Offer field to match the assigned source code. Offer codes are defined in and validated against the Offer table. See Working with Offers (WOFR) for more information. Alphanumeric, 3 positions; required.

Field	Description
Entity	The business unit in your company associated with the catalog request. If the *Track Customer History at Entity Level (F89)* system control value is *selected*: When you submit the requests for processing, the system creates a Customer Sold To Entity record for the entity specified for the catalog request, if any. If no entity is specified for the catalog request, the system creates a Customer Entity record for the entity associated with the *Default Source Code for Batch Catalog Requests (D37)* system control value. (An entity is associated with a source code through the division assigned to the source code.). *Errors:* The record is in error status if this field is not set to a valid entity. If the entity is not specified for the record, the system resets the entity to match the source code. Entity codes are defined in and validated against the Entity table. See *Working with Entities (WENT)*. Numeric, 3 positions; required.

Display Catalog Request Screen

To display: Select *Display* for a record at the Work with Catalog Request Interface Screen to advance to the Display Catalog Request screen. You cannot change any information on this screen. See *Change Catalog Request Screen* for field descriptions.

Processing Requests

Purpose: Select *Submit* at the *Work with Catalog Request Interface Screen* to submit requests for processing. The system submits the job *CATALOGREQ*, which:

- Checks each open record in the Catalog Request Interface table for errors. Each record that has an error is flagged with an error status (*E*).
- Checks for duplicates:
  - If the record's Perform duplicate check? flag is *selected*, the job checks the catalog request against existing customer sold to records based on match code. If the catalog request's match code is the same as an existing customer's, the job does not create a new customer; instead, it uses the existing customer. (If more than one customer record has the same match code, the job uses the first matching customer it finds.) See *Setting Up Match Codes (MMCH)*.
  - If the record's Perform duplicate check? flag is *unselected*, or if no customer records match the catalog request, the job creates a new sold to customer. See *Creating a New Customer*.
- Creates the catalog request. The job creates a catalog request only if the record's Create catalog request? flag is *selected*. You can review or process these catalog requests through the Work with Catalog Request menu option; see *Entering Catalog Requests (WCAT)*.
- Creates the *Print Request Interface Report* and the *Print Catalog Request Interface Errors Report*.
- Deletes each processed record from the Catalog Request Interface table.

Catalog Request Interface Errors

The following conditions put a catalog request in an error (*E*) status:

- Type field is blank
- Invalid postal code or SCF, or postal code does not match state
- State is not valid, or does not match country
- Country code is invalid
- Both last name and company name are blank
- No street address
- Entity is invalid
- Delivery code is invalid or blank
- Create catalog request? flag is invalid or blank
- Perform duplicate check? flag is invalid or blank
- Both offer and source code are blank (but this error is corrected when you next submit the records for processing if the *Default Source Code for Batch Catalog Requests (D37)* is assigned to the record)
- Offer is invalid
- Source is invalid

Certain errors, such as a missing source code, country, or entity, are corrected by the batch job during processing based on system control value defaults. See *Change Catalog Request Screen*.

Catalog Request Related System Control Values

System Control Value	Description
Default Country for Customer Address (B17)	If a country code is missing from the catalog request, Order Administration defaults the country code defined in this system control value to the catalog request.
Default Delivery Code for New Order Entry Customers (D13)	If a delivery code is missing from the catalog request, Order Administration defaults the delivery code defined in this system control value to the catalog request.
Default Source Code for Batch Catalog Requests (D37)	If both a source code and offer code have not been defined for the catalog request, Order Administration defaults the source code defined in this system control value to the catalog request. The source code indicates the offer (catalog) to mail to the customer.
Edit for Duplicate Catalog Requests (E46)	Defines whether Order Administration checks for duplicate records when you create a new catalog request. If a duplicate is found, Order Administration does not create a new catalog request and instead uses the existing request, resetting the Printed flag to *No* if necessary.
Duplicate Checking for Customers (F71-F77, H88 and I11)	Defines whether a catalog request received through the e-commerce qualifies as a match to an existing record based on match code, even if the first name is not exactly the same.

System Control Value	Description
Default Opt In/Opt Out Flag (G97)	Defines the value that defaults to the Opt-in/Opt-out field for the catalog request and customer sold to record. The opt-in flag indicates whether e-mail is the preferred method of correspondence for a customer. If the catalog request includes a value in the bill_to_opt_in flag, the system defaults this value to the catalog request and the customer sold to record. If the customer sold to record already has an opt-in value, the system overrides this value with the opt-in value passed in the catalog request. If the catalog request does not contain a value in the sold_to_opt_in flag, the system defaults the value defined in the *Default Opt In/Opt Out Flag (G97)* system control value.
Default Customer Class in Order Entry (D63)	If the *Require Customer Class in OE, WCAT, and WCST (H85)* system control value is *selected*, this customer class is assigned to new customers you create through the catalog request interface.

Creating a New Customer

If the catalog request does not match an existing customer based on match code, or if match code duplicate checking was not selected for the catalog request, the system creates a new sold to customer based on the information in the catalog request. The system uses the following information to create the new customer:

From the catalog request:

- Name and address information
- Delivery code
- Daytime, evening, and third (fax or mobile) phone numbers, and the extensions for the daytime and evening numbers
- Mail code and mail flag: from the allow_mail setting
- Rent flag: from the allow_rent setting
- Opt in/opt out: from the bill_to_opt_in setting

The country and source code may have defaulted from the *Default Country for Customer Address (B17)* and *Default Source Code for Batch Catalog Requests (D37)* settings in the System Control table.

Additional defaults from the System Control table:

- Associate flag: uses the setting from the *Default Associate Code (D09)* system control value
- Mail flag: uses the setting from the *Default Mail Name (D10)* system control value if it was not specified in the catalog request
- Rent flag: uses the setting from the *Default Rent Name (D11)* system control value if it was not specified in the catalog request
- Mail code: uses the setting from the *Default Mail Name (D10)* system control value if the allow_mail setting was not specified in the catalog request

- Opt-in/opt-out flag: uses the setting from the *Default Opt In/Opt Out Flag (G97)* system control value if it was not specified in the catalog request
- Customer class: uses the setting from the *Default Customer Class in Order Entry (D63)* system control value if the *Require Customer Class in OE, WCAT, and WCST (H85)* is *selected*

The Current mail type and Original mail type fields are set to *C* (catalog request).

Oracle Retail Customer Engagement customer integration: When you use the Oracle Retail Customer Engagement customer integration, if you create a customer through the catalog request interface, Order Administration sends the customer's name, address, email address, phone numbers, and contact permissions to Oracle Retail Customer Engagement so that the customer records in the two systems are synchronized. See the *Customer Engagement Customer Integration* for more information.

Purge Catalog Request History (PCRH)

Purpose: Use this option to delete outdated records from the Catalog Request History table. This table provides an historical record of catalog requests within your company, even after you have purged outdated catalog requests. You can include this information in reports, such as the Campaign Performance Report; see *Print Campaign Performance Reports (PCPR)* for more information.

How to display this screen: Enter *PCRH* in the Fast path field at the top of any menu, or select Purge Catalog Request History from a menu.

Completing this screen:

- Complete the Purge date field to indicate the earliest date for which you want to retain Catalog Request History records. Any records for catalog requests created earlier than this date will be purged.
- Select *Accept* to submit the *PRG_CATHST* job, which purges the records.

Managing Soldouts and Backorders

In this part:

- *Working with Soldout Controls (WSLD)* shows you how to create, change, delete, and display soldout controls in the Soldout Control table.
- *Processing Auto Soldout Cancellations (MASO)* presents the screen you use to cancel soldout items from those orders that contain them.
- *Generating Soldout Notifications (MSON)* shows you how to use the Print Soldout Notifications screen to produce soldout notifications that you send to your customers.
- *Purchase Order Layering and Backorder Notifications* shows you how to use the Generate Backorder Cards function to print backorder notification cards and the Backorder Cancellation Register.
- *Working with Held Detail Lines (WOHD)* shows you how to use the Work with Order Hold Detail screen. You use this screen to work with items that were held because they were coordinate grouped with items canceled through Process Auto Soldouts.

- *Working with Backorders Pending Cancellation (WBPC)* shows you how to use this menu option to continue to work with backorders once you have generated a second notice if the FTC--second notice output system control value is set to *FILE* or *FILE/PRINT*.
- *Processing Item Substitutions (PSUB)* shows you how to cancel all open, unreserved order lines for a particular item and add a substitute item to each order.

Working with Soldout Controls (WSLD)

Soldout control codes define which calculation the system uses to determine when to sell out an item. When a customer orders a soldout item in order entry or order maintenance, the order line is automatically closed with a status of *Soldout*. The soldout units and dollars are updated in the Item table, Item/Offer table, Source Code table and order history tables. You can define a soldout control code for an item in the S/O control field on the second item screen in item maintenance, or on the SKU screen if the item has SKUs. If you do not define a soldout control code for an item or SKU, it will never sell out automatically in order entry/ maintenance.

Brokered backorders? If you use Order Orchestration to fulfill backordered items, then unavailable items are otherwise eligible for brokering are submitted to Order Orchestration rather than selling out. See *Brokered Backorders* for a general overview, and see *Brokering Items with Soldout Control Codes* for details.

Pre-orders: Pre-order processing sells out brokered backorders automatically if the pre-order calculation indicates that there will not be a sufficient quantity of the item received on purchase orders for Order Orchestration to fulfill the orders. See *Enterprise Order Integration (Future Receipts and Active PO/Pre-Order Processing)* for more information.

In this topic:

- *Soldout Calculation*
- *Soldout Calculation for Eligible Warehouses*
- *What Happens when you Sell Out an Item in Order Entry?*
- *Process Auto Soldouts*
- *Disregarding Soldout Controls for Non-Allocatable Warehouses*
- *Projected Returns*
- *Work with Soldout Control Screen*
- *Create Soldout Control Screen*

Soldout Calculation

The Status field for the soldout control code defines the calculation the system uses to determine when to sell out the item if it is not eligible for fulfillment through the *Order Orchestration Integration*; see *Brokered Backorders* for an overview.

Status	Description
Sell Out Immediately	Sell out immediately, regardless of available on-hand stock. You would use this status code if you have open orders for an item that you now determine is sold out. Only items with this status are eligible for cancellation through *Processing Auto Soldout Cancellations (MASO)*.

Status	Description
Include On Order Quantity in Soldout Calculation	Sell out when the available quantity is less than or equal to zero, including the on order quantity and projected returns in the soldout calculation: `(On-order + on-hand + projected returns) - reserved < 0` The system includes projected returns if you specify a quantity in the Projected return field for an item or SKU; see *Projected Returns*. The system includes the on-order quantity for pending putaway detail records that are associated with a pending putaway warehouse whose “final destination” warehouse is allocatable in this calculation; see *Pending Putaway Overview*.
Exclude On Order Quantity in Soldout Calculation	Sell out when the available quantity is less than or equal to zero, excluding the on order quantity and projected returns in the soldout calculation: `On-hand - reserved < 0`

Soldout Calculation for Eligible Warehouses

When the system sells out an item with a soldout control code of *2* or *3*, the system limits the soldout calculation to the eligible warehouses instead of all allocatable warehouses.

- If you define a warehouse override for the order or order line, the system limits the soldout calculation to that warehouse.
- If a warehouse list is associated with the SCF for the order ship to, the system limits the soldout calculation to the warehouses for the selected warehouse list and the item’s primary warehouse.
- If a warehouse override has not been defined, or the SCF for the order ship to is not associated with a warehouse list, the soldout calculation includes all allocatable warehouses.

> **Note:**
>
> When the system sells out an item with a soldout control code of *1*, the soldout calculation includes all allocatable warehouses.

Example 1: Item SO10 exists in the following warehouses.

Warehouse	Open PO Qty	PO#	On Hand	Reserved	Available
206	20	112	10	5	5
207	0	201	20	20	-5

You add item SO10 to an order for 10 units. A warehouse override has been defined for the order for warehouse 207. The soldout code assigned to item SO10 is 2, which means the system uses this calculation to determine when to sell out the item:

```
(On-order + on-hand + projected returns) - reserved < 0
```

Because a warehouse override has been defined, the system only includes warehouse 207 in the soldout calculation:

```
(0 + 20 + 0) - 20 = 0
```

Because the quantity is not greater than 0, the system sells out the item.

If a warehouse override had not been defined, the system would have reserved the item because the soldout calculation would have included warehouses 206 and 207:

```
(20 + 30 + 0) - 25 = 25
```

Example 2: Item SO20 exists in the following warehouses.

Warehouse	Open PO Qty	PO#	On Hand	Reserved	Available
206	20	112	10	5	5
207	0	201	20	20	-5
601	25	356	30	20	10
602	40	475	40	25	15

You add item SO20 to an order for 1 unit. The SCF for the order ship to on the order is associated with a warehouse list containing warehouses 601 and 602. The soldout code assigned to item SO10 is 3, which means the system uses this calculation to determine when to sell out the item:

On-hand - reserved < 0

Because a warehouse list has been defined, the system only includes warehouses 601 and 602 and the item's primary warehouse 206 in the soldout calculation:

80 - 50 = 30

Because the quantity is greater than 0, the system does not sell out the item.

Example 3: Item SO30 exists in the following warehouses.

Warehouse	Open PO Qty	PO#	On Hand	Reserved	Available
206	20	112	10	5	5
207	0	201	20	20	-5
601	25	356	30	20	10
602	40	475	40	25	15

You add item SO30 to an order for 1 unit. A warehouse override is not defined and the SCF for the order ship to is not associated with a warehouse list. The soldout code assigned to item SO30 is 3, which means the system uses this calculation to determine when to sell out the item:

```
On-hand - reserved < 0
```

Because a warehouse override and a warehouse list has not been defined, the system includes all allocatable warehouses in the soldout calculation:

```
100 - 70 = 30
```

Because the quantity is greater than 0, the system does not sell out the item.

What Happens when you Sell Out an Item in Order Entry?

When you enter an item in order entry that is sold out, the system:

- adds the item with a status of *Soldout*
- does not increase the order totals
- does not display an ordered quantity or extended price (although the unit price does appear)

The soldout units and dollars are updated in the Item table, Item/Offer table, Source Code table and Order History tables.

If a partial quantity of the item is sold out on the order line, the appropriate quantities and prices display. For example, if the customer orders 10, 8 units reserve or go on backorder, and 2 units sell out, the totals for the order line reflect 8 units. The order line status will be open.

See *Working with Items on the Order*.

Accompanying items: If an accompanying item is associated with a soldout item, the system also sells out the accompanying item.

Promotional pricing incentives: If a soldout item has promotional pricing incentives associated with it, the incentives will still be offered to the customer during Order Entry.

Set items: See *Reserving Inventory for Set Orders* for a discussion of how the system handles soldout control codes assigned to set items and their components.

Process Auto Soldouts

Use the Process Auto Soldouts menu option to cancel orders for items that have become sold out since the time you entered them.

When you process auto soldouts, you have the option of updating the soldout control code in the SKU table automatically for each backordered item. See *Processing Auto Soldout Cancellations (MASO)*.

> **Note:**
>
> You can define a soldout control code in the *Default Soldout Control Code (D72)* system control value. This code will default when you create items and SKUs, although you can override it.

Disregarding Soldout Controls for Non-Allocatable Warehouses

If the *Disregard Soldout Controls for Non-Allocatable Warehouses (J27)* system control value is *selected*, the system disregards soldout control rules for inventory reserved against a non-allocatable warehouse.

- When you enter an item in order entry, the system reserves the item against the non-allocatable warehouse, regardless of the soldout control code defined for the item. If the item cannot be reserved, the system backorders the item in the non-allocatable warehouse.

- When you process auto soldouts, the system bypasses any order associated with a non-allocatable warehouse. The system considers an order associated with a non-allocatable warehouse if:
- A non-allocatable warehouse is defined for one or more lines on the order, or
- A non-allocatable warehouse is defined as the backorder warehouse for one or more lines on the order, or
- A non-allocatable warehouse is defined on the order header.

You can reserve items against a non-allocatable warehouse if the *Reserve from Non-Allocatable Warehouse (J25)* system control value is *selected*.

Brokered backorders: Even when the item's OROB eligible field is selected, the item reserves against the non-allocatable (retail) warehouse if the order type is associated with that warehouse.

Projected Returns

If you expect to be able to fulfill a certain number of backorders for an item using returns from your customers, you can prevent that number of orders from selling out automatically. For example, if you currently did not have any of item AA100 on hand, but you project at least 10 units will be returned, you can put the next 10 units ordered on backorder instead of having them sell out; then, when you receive the returned units from the customers, you can fulfill these backorders.

How to set the projected return total: Use the Projected returns field to specify the number of units you expect to receive in customer returns toward the fulfillment of backorders. This field appears on the *Create SKU 1 of 2 (With Overrides) Screen*, the *Create SKU 2 of 2 (With Overrides) Screen*, or the *Create Item (Base Information) Screen* for non-SKU'ed items.

When a return is processed, the system automatically subtracts the number of units returned from the number you initially entered in the Projected returns field. The number will never be less than *0*, however. For example, if you initially enter a value of *10* in this field, and 11 units of this item are returned, the Projected returns field will show a value of *0* when the returns are processed. Updating this field does not affect any orders already entered.

> **Note:**
>
> The system checks this field only if the item has a soldout control value of *Include On Order Qty in Sold Out Calculation*. If the item has a soldout control value of *Sell Out Immediately* or *Exclude On Order Qty in Sold Out Calculation*, the system does not retain any units from selling out based on projected returns. The system does not consider this field when determining whether a backordered line is eligible for fulfillment through Order Orchestration; see *Brokered Backorders* for background.

Projected return calculation: If you specify a number of units in the Projected returns field, this number is included in the total number of units that the system will backorder before selling out the item. When an item has a soldout control value of *2*, this total includes:

- on-order quantity (on unreceived purchase orders)
- projected return quantity

For example, item AA100 has

- {on-hand quantity 5}

- on-order quantity = 20
- projected return quantity = 10
- {total quantity to reserve = 5}
- total quantity to backorder =30

If you enter an order for 35 units or fewer, the item will be backordered and not sold out. However, if there were already a backordered quantity of 20, only orders for 15 units or fewer would be backordered and not sold out.

Brokered backorders: The system does not consider the projected returns quantity when determining whether to assign the item to Order Orchestration for fulfillment. See *Brokered Backorders* for an overview, and *Brokering Items with Soldout Control Codes* for details.

Work with Soldout Control Screen

Purpose: Use this screen to create, change, delete, and display these codes.

How to display this screen: Enter *WSLD* in the Fast Path field at the top of a menu or select Work with Soldout Controls from a menu.

Field	Description
Code	Represents the item soldout control. Alphanumeric, 2 positions; optional.
Description	The description of the soldout code. Alphanumeric, 30 positions; optional.
Status	Represents the soldout status. Valid Values: • Sell Out Immediately • Include On Order Qty in Sold Out Calculation • Exclude On Order Qty in Sold Out Calculation Optional.

Screen Option	Procedure
Create a soldout control	Select *Create* to advance to the *Create Soldout Control Screen*.
Change a soldout control	Select *Change* for a soldout control to advance to the Change Soldout Control Screen. At this screen you can change any information except the soldout control code. See Create Soldout Control Screen for field descriptions.

Screen Option	Procedure
Delete a soldout control	Select *Delete* for a soldout control to delete it. Delete soldout control records with caution. The soldout control code is assigned at the item level. When the control applies to a item on an order, the status of the item remains open if you delete the control code before notifying the customer. You may wish to generate a report identifying the orders that might be affected before deleting the code. See *Processing Auto Soldout Cancellations (MASO)*. **Note:** You can delete this code even if it is assigned to an item. The next time you maintain the item you will receive a message indicating that the code assigned to the item is not found.
Display a soldout control	Select *Display* for a soldout control to advance to the Display Soldout Control Screen. You cannot change any information on this screen. See *Create Soldout Control Screen* for field descriptions.

Create Soldout Control Screen

Purpose: Use this screen to create soldout control codes.

How to display this screen: At the *Work with Soldout Control Screen*, select *Create*.

Field	Description
Code	A code that defines the type of soldout handling that applies to an item. You enter this code in the S/O control field on the second item screen in item maintenance, or on the SKU screen if the item has SKUs. If you do not enter a soldout control code for an item or SKU, it will never sell out automatically in Order Entry or Order Maintenance. You can define a soldout control code for: • Items that must be sold out immediately, regardless of available quantity • Items whose available quantity is less than or equal to zero (not including open purchase orders) • Items whose available quantity is less than or equal to zero (including open purchase orders) See the *Sts (Status)* field. Alphanumeric, 2 positions. Create screen: required. Change screen: display-only.
Description	Text that describes the code. Alphanumeric, 30 positions; required.
Sts (Status)	A number that directs the system whether to close a soldout line item during Order Entry or Order Maintenance. Valid values are: • *Sell Out Immediately* = Sell out immediately, regardless of available on-hand stock. You would use this status code if you have open orders for an item that you now determine is sold out. *Only* items with this status are eligible for cancellation through the Auto Soldout Cancellation program. • *Include On Order Qty in Sold Out Calculation* = An item is sold out when this condition is met: `(On-order + on-hand) - reserved < 0` If you specify a quantity in the Projected return field for an item or SKU, this quantity is also included in the calculation above. See *Projected Returns*. The system includes the on-order quantity for pending putaway detail records that are associated with a pending putaway warehouse whose “final destination” warehouse is allocatable in this calculation; see *Pending Putaway Overview*. 1. *Exclude On Order Qty in Sold Out Calculation* = An item is sold out when the following condition is met: `On-hand - reserved < 0` Required.

Processing Auto Soldout Cancellations (MASO)

Purpose: Process auto soldout cancellations when you want to automatically cancel soldout items that were ordered before the item sold out, or to print a list of all such items.

Overview: When you process auto soldout cancellations, the system:

1. Reads every item or SKU that has a soldout control status of 1 (sell out immediately).
2. Checks the setting of the *Auto Soldout Cancel Reason (C20)* system control value.
3. Locates every matching open, fully backordered, unreserved line item on open or held orders. Also, locates every matching open, unreserved line item on quotes.
4. Looks at the setting of the *Disregard Soldout Controls for Non-Allocatable Warehouses (J27)* system control value. If this system control value is *selected*, the system bypasses any order that is associated with a non-allocatable warehouse.
5. Cancels each of the selected items.
6. Automatically recalculates freight and tax.
7. Removes any duty charge from the Handling field that is associated with the soldout item.
8. Optionally, closes any positive or negative additional charges on orders where processing auto soldouts has the effect of closing the order (if you *select* the Open charges if order closes field when you process auto soldouts).
9. Writes a record, displayed at the *Display Order Line History Screen* or *Order Line Activity* window in Modern View, indicating that the item has been sold out.
10. Generates notification records that you can use to generate soldout cards, emails, or XML messages using the Print Soldout Notifications function (See *Generating Soldout Notifications (MSON)*).
11. Generates the *Auto Soldout Register*.

Note:

- Orders that are suspended at the time you process auto soldout cancellations do not sell out. You can sell out the items on these orders at a later time, either by processing auto soldouts again or through Order Maintenance.
- Order lines that are partially reserved are not automatically cancelled by this process.

Stored value card authorization reversal: If a stored value card payment is associated with a cancelled item and has an open, unused authorization amount, the system generates a stored value card authorization reversal; see *Stored Value Card Authorization Reversal*.

Retail pickup or delivery order: If you sell out an order line on a retail pickup or delivery order received from Order Orchestration, the system sends a status update to Order Orchestration indicating the order was *Rejected*. Order Orchestration then attempts to reassign the order to another location for fulfillment. The Order Orchestration record's status in Order Administration changes to *Rejected*. See *Retail Pickup (including Ship-for-Pickup) or Delivery Orders* for an overview.

Pick slip preparation: When you process auto soldout cancellations, the system performs pick slip preparation:

1. The system REMOVES any pick slip preparation from the order.
2. Once the system processes auto soldout cancellations, the system EVALUATES the order to determine if it is eligible for pick slip preparation.
3. If the order is eligible for pick slip preparation after the changes to the order have been made, the system RE-APPLIES pick slip preparation to the order.

See *Preparing Orders for Pick Slip Generation* for processing details.

Reviewing order history: When you review a soldout line in Order Inquiry, you can determine how the item was sold out through the *Display Order Line History Screen* (select *Order History*) as follows:

- If the item was sold out through *Sell Out*, the quantity is negative and the name of the user who sold out the item is listed
- If the line sold out automatically in Order Entry because there was a soldout control code assigned to the item, the line history has a positive quantity, and the name of the user who entered the order is listed
- If the line was sold out through Process Auto Soldouts, the quantity is negative and no user name is listed

> **Note:**
>
> When you sell out an item, the system also writes a message, visible on the *Display Order History Screen*, indicating that the order was maintained.

Holding coordinate grouped items: You have the option of placing any items coordinate grouped with sold out items on hold at the time you process auto soldouts, if you *select* the Hold related coordinate group lines field. In this case, the system also generates the *Order Hold Detail Report*. You can use this report to contact the customers and see if they still want the coordinate grouped items.

Retaining items from sellout: You have the option of retaining a quantity of an item from selling out if you expect to receive some units in the near future that you can use to fulfill these orders. For example, if you expect a certain number of returns on an item, you might choose to keep an appropriate number of order lines open when you process auto soldouts. In this case, the system uses the Sold out retention method system control value to determine whether to retain your oldest or newest orders containing the backordered item. The system also produces the *Auto Sold Out Retained Order Register*. See *Retaining Item Quantities* for an overview of this process and more information.

Unfulfillable through Order Orchestration?If a backordered item is brokered to Order Orchestration's Order Orchestration, but Order Orchestration cannot fulfill the item, the item might sell out automatically.

Example: An item is unavailable in the warehouse, so the system assigns it to Order Orchestration for fulfillment; however, Order Orchestration cannot find a location to fulfill the item, and rejects the item as unfulfillable. In Order Administration, the item is assigned a soldout control value indicating to include the on-order quantity of any open purchase orders before selling out the item, but there are no open purchase orders. As a result, the unfulfillable item sells out automatically after it is rejected by Order Orchestration.

When you use the Process Auto Soldouts option, any unfulfillable items that have sold out automatically after rejection by Order Orchestration are listed on the *Auto Soldout Register*, regardless of whether the items are assigned a soldout control value to sell out immediately.

After you have used the Process Auto Soldouts option, the item is then eligible to have a soldout notification generated through the *Generating Soldout Notifications (MSON)* option, even if you did not select the Update orders option at the *Process Auto Sold Outs Screen*.

The same process applies if Order Orchestration returns an error for a brokered backorder.

See *Brokered Backorders* for background on fulfilling backorders through integration with Order Orchestration's Routing Engine module.

In this topic:

Process Auto Sold Outs Screen

Purpose: Use this screen to cancel all lines for sold out items on quotes and orders. The order must be open or held and the item must be backordered (unreserved).

Notifications: You must generate soldout notifications as a separate step after you run Auto Soldouts. See *Generating Soldout Notifications (MSON)*.

How to display this screen: Enter *MASO* in the Fast path field at the top of any menu or select Process Auto Soldouts from a menu.

Field	Description
Update orders	Controls whether the system cancels order lines for sold out items. Valid values are: • *Selected* = Cancel sold out order lines. • *Unselected* = (default) Do not cancel sold out order lines; run the Auto Soldout Register only.
Hold related coordinate group lines	Controls whether the system places items on hold if they are on the same order with a sold out item and share a coordinate group code. The system does not create pre-generated picks for held items; see *Selecting Order Lines for Pick Slip Preparation*. You assign a coordinate group code to items or SKUs if they are related, such as a blouse and skirt, or a plate, cup and bowl. Your customers can order each item individually, but if coordinate grouped items are on the same order, the system forces these items to ship together. The system lists any held coordinate grouped items on the *Order Hold Detail Report*, produced when you process auto soldouts. You can then work with the held lines either through Order Maintenance or the Work with Order Hold Detail Function; see *Working with Held Detail Lines (WOHD)*. Valid values are: • *Selected* = Place coordinate grouped items on the same orders on hold. Valid only if you *selected* the Update orders field. • *Unselected* = (default) Do not place coordinate grouped items on the same orders on hold.

Field	Description
Delete open charges if order closes	Controls whether the system deletes any additional charges, either positive or negative, if processing auto soldouts closes the order completely. The system does not write order history to indicate if additional charges were deleted in this way and simply removes the charges from the order. Valid values are: • *Selected* = Delete open additional charges. • *Unselected* (default) = Do not delete open additional charges.
Soldout control code to update SKUs	Use this field to specify a soldout control code to assign to each item or SKU with a backorder quantity when you process auto soldouts. Assigning a soldout control code through this field might be useful to you if you use the *Enter Quantity to Retain Screen* to keep orders open for certain items. See *Retaining Item Quantities* for more information on how you might use this field. The soldout control code most recently entered in this field when you processed auto soldouts defaults, but you can override it. Soldout control codes are defined in and validated against the Soldout Control Code table. See *Working with Soldout Controls (WSLD)*. Alphanumeric, 2 positions; optional.

Instructions: Use the following steps to process auto soldouts:

1. Complete each field on this screen and select *OK*.
2. If you want to retain any item quantities, select *Review Items* to advance to the *Enter Quantity to Retain Screen*. You cannot advance to this screen unless the Update orders field is *selected* and you have selected a *Sold Out Retention Method (E63)*. See Retaining Item Quantities.
3. If you are not retaining item quantities, select *Accept*. If you *selected* the Update orders field, the system submits a batch job called *AUTO_SO*, which cancels the items on quotes and orders and generates the *Auto Soldout Register*. Each sold out order line has a status code of *S*. If you also *selected* the Hold related coordinate group lines field, the system also submits a batch job called *ORD_HOLD*, which places items coordinate grouped with the sold out items on hold and generates the *Order Hold Detail Report*. Each held order line has a status code of *H*. If you *selected* both fields, the system generates the *Auto Soldout Register* only.

Note:

If an order has more than one item that needs to be canceled because it is sold out, the system produces one soldout card per item, and writes one message line per item to the Order Line History table. Each message line indicates that the item was canceled because it was sold out.

Screen Option	Procedure
Review items and specify quantities to retain from selling out	select *Review Items*. See *Retaining Item Quantities*.
Process auto soldouts	Select *Accept*.

Retaining Item Quantities

Process overview: When you process auto soldouts, you can prevent certain items or SKUs from selling out completely. For example, you might have sold all of your remaining stock of item AB100 and don't plan to order any more. However, based on this item's history you can expect to receive about 15 units as returns. In this case, you can use the *Enter Quantity to Retain Screen* to keep orders for 15 units of AB100 open when you process auto soldouts.

When you process auto soldouts, you have the option of resetting the soldout control code for each backordered item or SKU to the value you specify at the *Process Auto Sold Outs Screen*. Typically, you would reset the soldout control code to one with a status of *Include On Order Qty in Sold Out Calculation* or *Exclude On Order Qty in Sold Out Calculation*, since only items assigned a soldout control code with a status of *Sell Out Immediately* are eligible to be sold out by Process Auto Soldouts. Resetting the soldout control codes for the items and SKUs prevents them from appearing on the *Enter Quantity to Retain Screen* or being inadvertently sold out while you attempt to fulfill the retained orders.

When you no longer expect to receive any additional units of an item, you may still have retained orders on your system that you are not able to fulfill. In this case, you could change the soldout control code for the item or SKU back to a code with a status of *Sell Out Immediately*. You can then sell out the item completely the next time you process auto soldouts.

Which orders to retain? The sequence in which the system selects orders to retain is controlled by the Sold out retention method system control value. Valid settings for this field are:

- *FIFO*: oldest orders are selected for retention first
- *LIFO*: newest orders are selected for retention first.

The system selects an order line for retention only if it can retain the entire backordered quantity of the item on the line. For example, if you set a retention quantity of 3, and the first order line the system evaluates has a backordered quantity of 5, the system skips this order line and evaluates the next. The order line with the quantity of 5 is sold out.

Another example:

Item AB100 has a quantity to retain of 5 units and the soldout retention method being used is *LIFO*. The orders on the system, from newest to oldest, are:

Order Number	Units
2000	1
1999	5
1998	3
1997	3
1996	1
1995	1

The system evaluates the orders as follows:

1. Order 2000 with 1 unit is evaluated first, and the order is retained.
2. Order 1999 with 5 units is evaluated next, but there are just 4 units available for retention. The order is sold out.

3. Order 1998 with 3 units is evaluated next, and the order is retained.
4. Order 1997 with 3 units is evaluated next, but there is just one unit available for retention. The order is sold out.
5. Order 1996 with 1 unit is evaluated next, and the order is retained.
6. Order 1995 is sold out.

If there are no open order lines that meet the evaluation criteria (that is, the backorder quantity is less than or equal to the retention quantity), no orders are retained.

Enter Quantity to Retain Screen

Purpose: Use this screen to review the quantities of items eligible to be sold out when you submit the Process Auto Soldouts job, and to specify any item quantities you want to retain from selling out. The selected number of order lines remain open so that if, for instance, you expect to receive that quantity of returns, you can fulfill the orders using the returned items.

How to display this screen: Select *Review Items* at the *Process Auto Sold Outs Screen*. You can display this screen only if:

- you have selected a valid retention method in the *Sold Out Retention Method (E63)* system control value, and
- you have *selected* the Update orders field on the *Process Auto Sold Outs Screen*.

> **Note:**
>
> This screen displays each item or SKU assigned a soldout control code with a value of *1*, which may include discontinued items for which you are not taking any more orders. To prevent such an item from appearing on this screen, you can change its soldout control code to one with a value of *2* or *3*.

Field	Description
Item	The unit of inventory currently eligible for selling out. Each item or SKU assigned a soldout control code with a value of *1* appears on this screen. Alphanumeric, 12 positions; optional.
SKU	The item's unique characteristics, such as its color and size. Alphanumeric, three 4-position fields; optional.
Qty to retain (Quantity to retain)	The quantity of the item or SKU to prevent from selling out. You cannot enter a number greater than the backorder quantity. Numeric, 8 positions; optional.
Qty/BO (Quantity on backorder)	The total number of units of the item that is currently backordered. Numeric, 8 positions; display-only.
Status	The status of the item specified in the item or SKU table. The item status appears for SKU'd items if no status code is specified at the SKU level. Alphanumeric, 1 position; display-only.

Instructions: Follow the steps below to complete this screen:

1. Optionally, enter a quantity to retain for any selected items or SKUs. The system does not allow you to retain a quantity of an item that is greater than the backordered quantity.
2. Select *Accept* to process auto soldouts. If you cancel from this screen, the system clears your entries in the retained quantities fields.

When you process auto soldouts from this screen, the system produces the *Auto Sold Out Retained Order Register* in addition to the *Auto Soldout Register* and the *Order Hold Detail Report*.

Generating Soldout Notifications (MSON)

Purpose: Use the Print Soldout Notifications function when you want to notify customers about soldout items being canceled from their orders.

Order type and sellouts in order entry and order maintenance: The order type and the way in which you sell out the item determines whether a customer receives a soldout notification. For example, you might set up phone orders so that the customer does not receive a notification when you sell out an item in order entry, because you can advise the customer during the phone call. However, you might choose to print a soldout notification for orders you receive through the mail or from the web storefront. The *Soldout notifications* field in the Order Type table determines whether to generate a notification for items that are sold out in order entry and order maintenance.

Processing auto soldouts: The *Processing Auto Soldout Cancellations (MASO)* menu option generates a notification for each item it sells out, regardless of order type.

Periodic function: You can use the *PFSDOUT* periodic function (program name: *CSSDOUT*) to generate soldout notifications. See *Scheduling Jobs*.

Email or XML notifications: The system sends an email notice to the customer rather than generating a document for printing if the order is eligible. See *When Does the System Generate an Email Notification?* for an overview. If the order is eligible for an email notification but the XML only? flag on the soldout notification email template is selected, the system generates the *Outbound Email XML Message (CWEmailOut)* instead of sending an email. See the *Credit Card Credit Acknowledgement Email Sample and Contents* and the *Sample Soldout Notification XML Message* for examples.

For more information, see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Email template: You can use the *Working with Entities (WENT)* menu option to create an entity-level soldout notification email template, and the *Working with E-Mail Notification Templates (WEMT)* menu option to create a default company-level soldout notification template. The template specifies the text to print above and below the standard soldout notification information. Also, the *Soldout Notification E-Mail Program (G96)* system control value defines the format of the notification email.

Save in email repository? The *Write Outbound Email to Email Repository (H99)* system control value controls whether email notifications are stored in correspondence history. See this system control value for more information on identifying and reviewing outbound emails for a customer.

Unfulfillable through Order Broker? If a backordered item is brokered to Order Broker's Order Broker, but the Order Broker cannot fulfill the item, the item might sell out automatically.

Example: An item is unavailable in the warehouse, so the system assigns it to the Order Broker for fulfillment; however, the Order Broker cannot find a location to fulfill the item, and rejects the item as unfulfillable. In Order Administration, the item is assigned a soldout control value indicating to include the on-order quantity of any open purchase orders before selling out the item, but there are no open purchase orders. As a result, the unfulfillable item sells out automatically after it is rejected by the Order Broker.

When you use the Process Auto Soldouts option, any unfulfillable items that have sold out automatically after rejection by the Order Broker are listed on the *Auto Soldout Register*, regardless of whether the items are assigned a soldout control value to sell out immediately.

After you have used the Process Auto Soldouts option, the item is then eligible to have a soldout notification generated through the *Generating Soldout Notifications (MSON)* option, even if you did not select the Update orders option at the *Process Auto Sold Outs Screen*.

This same process applies if the Order Broker returns an error for a brokered backorder.

See the *Brokered Backorders* for background on fulfilling backorders through integration with Order Orchestration's Routing Engine module.

In this topic:

- *Print Soldout Notification Screen*
- *Soldout Notification Card*

Print Soldout Notification Screen

How to display this screen: Enter *MSON* in the Fast path field at the top of any menu or select the Print Soldout Notifications option from a menu.

Instructions: Follow these steps to print soldout notification cards, or to generate notification emails or the XML message (see *When Does the System Generate an Email Notification?*):

1. Select *OK* to submit the print job; otherwise, select *Exit* to cancel.
2. This submits the batch job *SLDOUT_PRT*. This job generates the *Soldout Notification Card*, soldout notification email (see *Credit Card Credit Acknowledgement Email Sample and Contents*), or the outbound XML message (see *Sample Soldout Notification XML Message*).

For more information, see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

> **Note:**
>
> In order to generate soldout notifications, you need to specify a program in the *Soldout Notification Print Program (E75)* system control value. If no program is specified, the screen displays an error message:

```
No soldout print program has been defined in SCV E75.
```

Order history message: The system also writes a message such as the following, which is visible on the Display Order History Screen:

```
S/O card generated-line 1
```

If the system sent an email notification or XML message to the customer rather than generating a PDF soldout notification, it also writes a message such as the following:

```
S/O Notice to ejohnson@example.com
```

Generate Backorder Notices (GBOC)

Use the Generate Backorder Notifications function to generate notices (cards, emails, or the *Outbound Email XML Message (CWEmailOut)*) informing customers when backordered items are expected to ship. The function automatically generates an initial (first) backorder notice if you select the *Immediate B/O notice* field at the *Create Order Type Screen*.

For more information, see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

If you have defined a *Number of Days to Delay Initial Backorder Notice (D89)* in the System Control table, the system does not generate a notice for a backordered item unless you do not expect to ship the item until after the defined delay period.

> **Note:**
>
> Once an expected delivery date for a backordered item is expired or changed, the system automatically generates a backorder notice, regardless of the value in the *Immediate B/O notice* field.

Typically, you would want to notify customers immediately about backordered items if they place an order through the mail or fax; you can inform customers who order by phone at the time you take their orders if an item they want is currently backordered.

Order Orchestration: If an order line is assigned to Order Orchestration for fulfillment, this option does not generate backorder notices for the order line while the Order Orchestration request is in process; however, if Order Orchestration cannot fulfill the order, the order line returns to standard backorder processing and is eligible for backorder notice generation.

See the *Order Orchestration Integration* for background.

Generate notice if purchase order changes? The *FTC - Suppress Backorder Notice for Due Date Changes (L65)* system control value controls whether to generate a backorder notice if you change the due date for the next expected purchase order to a later date, or cancel the purchase order.

Quotes? The system does not generate backorder notification emails for quotes; see *Entering Pre-Order Quotes* for an overview.

Instructions:

1. Enter *GBOC* in the Fast path field at the top of any menu, or select Generate Backorder Cards from a menu.
2. The system submits the *BO_CARDS* job and displays a confirmation message at the bottom of the screen.
3. The job generates:
   - first, second, and continuing backorder cards (depending on the settings in the System Control table) using the *Backorder Card Print Program (D04)*; see *Backorder Card*

- first, second, and continuing email backorder notifications or the *Outbound Email XML Message (CWEmailOut)* rather than generating document notices for printing for certain customers; see *When Does the System Generate an Email Notification?*
- For more information, see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
- the *Backorder Cancellation Register*

4. The job writes a message to the Order History table, such as:

```
1st B/O--line 2, ship date 11/15/06
```

Also, in the case of an email notification, the system writes an Order History message such as:

```
BO 1st Ntf to ejohnson@example.com.
```

This message indicates the user ID of the person who submitted the *BO_CARDS* job.

If using backorders pending cancellation: If the *FTC--Second Notice Output (E68)* system control value is set to *FILE/PRINT* or *FILE*, and the *FTC -- Action after Second Notification (C70)* value is set to *CANCEL*, the job creates records in the Backorder Cancellation Pending table (*BOCANP*) for each second notice. You can use *Working with Backorders Pending Cancellation (WBPC)* to continue to work with these orders. Your options include:

- advancing to order maintenance or standard order inquiry
- accepting a backorder delay
- canceling a group of backorders
- generating backorder notices

You can generate backorder notices through the Work with Backorders Pending Cancellation menu option only if the *FTC--Second Notice Output (E68)* system control value is set to *FILE*. The system submits the job *SEC_NOTICE* when you generate notices through this menu option. In this situation, the system writes two order history messages: one when you write the record to the Backorder Cancellation Pending table, and one when you actually generate the notice. Both messages are identical.

For more information:

- *Purchase Order Layering and Backorder Notifications*
- *Purchase Order Layering*
- *Working with Backorders Pending Cancellation (WBPC)*

Working with Held Detail Lines (WOHD)

Purpose: Use the Work with Order Hold Detail function to review or release coordinate grouped items that were held by *Processing Auto Soldout Cancellations (MASO)*.

The Process Auto Soldouts function cancels all open, unreserved lines for any item with a soldout control code of “sellout immediately” defined in the Item table. If the item is coordinate grouped with other items, you have the option of placing the related items on hold at the time you process auto soldouts. Coordinate groups, identified by a code in the Item table, include items that you can sell separately, but should be shipped together when they appear on the same order. An example would be a matching skirt and blouse, or a cup, plate and bowl set.

You can use the Work with Order Hold Detail function to release held coordinate group items, or to advance to Order Maintenance. In Order Maintenance, you have the option of releasing the items, canceling them, selling them out or maintaining the order in any other way. When you release, cancel, or sell out the held item, you remove it from the Order Hold Detail table.

Note:

1. The system places coordinate grouped items on hold only when related items are soldout through *Processing Auto Soldout Cancellations (MASO)*, *not* when you sell out an item through Order Entry by selecting *Sell Out*, and *not* when an item sells out in Order Entry automatically because of a soldout control code in the Item table.
2. This menu option does not display order lines put in hold status manually, or through a special handling format; see *Putting a Line on Hold through a Special Handling Format*.

In this topic:

- *Work with Order Hold Detail Screen*
- *Releasing Items*

For more information:

- *Processing Auto Soldout Cancellations (MASO)*
- *Changing Item Detail Line Information in Order Maintenance*
- *Working with Existing Items (MITM)* for more information on assigning coordinate groups or soldout controls to items.

Work with Order Hold Detail Screen

Purpose: Use this screen to review held coordinate group items, release the items, or advance to Order Maintenance.

How to display this screen: Enter *WOHD* in the Fast path field at the top of any menu or select Work with Order Hold Detail from a menu.

Field	Description
Batch	The batch number assigned by the system when you processed auto soldouts. The system may reuse a batch number if all the items in the batch have been released or canceled. Numeric, 7 positions; optional.
Order	The number of the order that includes the soldout and held items. Numeric, 8 positions; optional.
Seq	The line number of the item on the order. Numeric, 5 positions; display-only.
CG (Coordinate group)	The coordinate group code assigned to the item in the Item table. Numeric, 3 positions; optional.
Item no.	This code represents a unit of inventory that you sell. Item codes are defined in and validated against the Item table. See *Performing Initial Item Entry (MITM)*. Alphanumeric, 12 positions; optional.

Field	Description
Clr size wdth (SKU codes)	The item's unique characteristics, such as its color and size. The SKU column headings defined in the System Control table display here. Alphanumeric, three 4-position fields; display-only.
Description	The description associated with the Item. Alphanumeric, 25 positions; display-only.
Customer first name (Unlabeled field below the coordinate group code)	The first name of the customer who placed the order. Alphanumeric, 15 positions; display-only.
Customer last name (Unlabeled field below the SKU fields)	The last name of the customer who placed the order. Alphanumeric, 25 positions; display-only.
Phone number (Unlabeled field below the item description)	The daytime phone number of the customer who placed the order. Alphanumeric, 14 positions; display-only.

Screen Option	Procedure
Release an item	Select *Release* for an item to release it. See *Releasing Items*.
Advance to Order Maintenance	Select *Order Maintenance* for an item to advance to Order Maintenance, where you can release the item, cancel it, sell it out, or maintain the order in other ways. When you cancel, release, or sell out the item, you remove it from the Order Hold Detail table. See *Changing Item Detail Line Information in Order Maintenance*.
Batch release	Select *Batch Release*. See *Releasing Items*.
Print a list	Select *Print List* to print the *Order Hold Detail Report*, listing all held coordinate group items.

Releasing Items

Release an item: Select *Release* for an item at the *Work with Order Hold Detail Screen* to release it. The item disappears from the screen, and the status of the order line changes to open. The item is now eligible to print on a pick slip.

Release a batch: Select *Batch Release* at the *Work with Order Hold Detail Screen* to release an entire batch. You might need to release an entire batch at once if you processed an auto soldout inadvertently, or if you determine that the held items in the batch can be shipped alone without notifying customers.

Enter the number of the batch you want to release in this pop-up window. The system releases the batch, and all the held items within the batch disappear from the *Work with Order Hold Detail Screen*.

Pick slip preparation: When you release an item or batch from hold, the system determines whether the order is eligible for pick slip preparation; see *Preparing Orders for Pick Slip Generation*.

Working with Backorders Pending Cancellation (WBPC)

Purpose: Use the Work with Backorders Pending Cancellation menu option to work with orders and order lines that have been flagged for cancellation due to backordered items.

Options: The options available through this function are:

- order maintenance or standard order inquiry
- *Inquiring into Item Availability (DIAV)*
- changing the backorder dates for orders where the customer has accepted the delay
- canceling orders or order lines
- flagging an order to suppress or unsuppress generation of backorder notices
- generating backorder notices
- printing the *Order Cancellation List by Item*. You can also print this report through the *Printing the Order Cancellation List (PBRI)* menu option.

When available? The system creates records in the B/O Cancellation Pending table for order lines flagged for cancellation when you generate backorder notices through *Generate Backorder Notices (GBOC)* if:

- the *FTC--Second Notice Output (E68)* system control value is set to *FILE* or *FILE/PRINT* (If this system control value is set to *PRINT*, the system generates the backorder notices and does not save records in this file); and
- the *FTC -- Action after Second Notification (C70)* system control value is set to *CANCEL*.

> **Important:**
>
> Orders that are flagged for cancellation due to credit card decline but also would be eligible for cancellation due to backordered items are not visible or accessible through *Working with Credit Card Cancellations (WCCC)*.

Drop ship items: Drop ship items are not included in the B/O Cancellation Pending table.

Quotes: Orders flagged as pre-order quotes are not included in the B/O Cancellation Pending table; the system includes quotes once they are converted to an order; see *Entering Pre-Order Quotes* for an overview and required setup.

Cancellation email: The system generates an order or order line cancellation email or *Outbound Email XML Message (CWEmailOut)* to the customer if:

For more information, see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

- you have specified an:
  - *Order Line Cancellation Email Program (K79)*, if there is still at least one open line on the order and no order lines have shipped, or
  - *Order Cancellation Email Program (K78)*, if you are canceling the last open line on the order, and

- the cancel reason code you use does not match the *Cancel Reason Code to Suppress Email (L08)*, and
- the customer is eligible to receive email notifications; see *When Does the System Generate an Email Notification?*

See the *Order Cancellation Confirmation Email Sample and Contents* and the *Order Line Cancellation Confirmation Email Sample and Contents* for more information.

Retail pickup and delivery orders: If you cancel a retail pickup or delivery order received from Order Orchestration, the system sends Order Orchestration a status update indicating that the order has been canceled. This status indicates to Order Orchestration that it should not attempt to find another location to fulfill the order. See *Retail Pickup (including Ship-for-Pickup) or Delivery Orders* for an overview.

Pick slip preparation: When you cancel an order, the system removes any pick slip preparation that has been applied to the order. When you cancel order lines, the system removes any pick slip preparation that has been applied to the order and then reevaluates the order for pick slip preparation; see *Preparing Orders for Pick Slip Generation*.

In this topic:

- *Work with Backorders Pending Cancellation Screen*
- *Display Backorder Notice Screen*
- *Suppressing and Unsuppressing Notices*
- *Accepting the Delay*
- *Cancel Backordered Lines Window*
  - *Orders Canceled After Second Notice Report*

For more information: See *Printing the Order Cancellation List (PBRI)*.

Work with Backorders Pending Cancellation Screen

How to display this screen: Enter *WBPC* in the Fast path field at the top of any menu or select Work with Backorders Pending Cancellation from a menu.

Field	Description
Order #	The number of the order flagged for cancellation due to the backordered item. Numeric, 8 positions; optional.
Date	The date you entered the order. Numeric, 6 positions (in user date format); display-only.
SKU	The item's unique characteristics, such as its color and size. Enter a valid SKU code to display orders that match your entry. **Note:** You can scan on SKU code with or without entering an item code. Alphanumeric, three 4-position fields; optional.

Field	Description
Item	The code representing the unit of inventory that is backordered. Alphanumeric, 12 positions; optional.
B/O (Next backorder date)	The next date when the order is eligible for a backorder notice. Numeric, 6 positions (in user date format); display-only.
Cancel (Cancel date)	The date when the order line is eligible for cancellation due to backorder. This date also appears on the order detail line (available by selecting *Display* for the item in standard order inquiry, or *Change* for the item in order maintenance, or by selecting the *Detail* option in streamlined order inquiry). See Cancel Backordered Lines Window. Numeric, 6 positions (in user date format); optional.
Prt (Printed?)	Indicates whether you have already generated a backorder notice (printed, emailed, or in the *Outbound Email XML Message (CWEmailOut)*) for this item. For more information, see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Valid values are: • *selected* = A backorder notice was generated. • *unselected* = A backorder notice was not generated. If the *FTC--Second Notice Output (E68)* system control value is set to *FILE/PRINT*, this field will be *selected*. If the system control value is set to *FILE*, this field will be *unselected*. (If the system control value were set to *PRINT*, you would not be able to use the Work with Backorders Pending Cancellation menu option to review orders.)
Sup (Suppress printing?)	Indicates whether to generate a backorder notice when you select *Print Notices*. Valid values are: • *selected* (default) = Suppress generation (do not generate notices). • *unselected* = Do not suppress notice generation. You can switch this flag from suppressed to unsuppressed, or vice versa, by selecting *Suppress/Unsuppress Notice* for the item. You select *Print Notices* to generate each unsuppressed notice. However, the *FTC--Second Notice Output (E68)* system control value must be set to *FILE* in order for you to generate notices this way; if not, a message indicates: `E68 must be set to file.`

Screen Option	Procedure
Display complete backorder notice details	Select *Display* for an item to advance to *Display Backorder Notice Screen*.
Advance to standard order inquiry	Select *Order Inquiry* for an item. See *Order Inquiry*.
Advance to order maintenance	Select *Order Maintenance* for an item. See *Changing Item Detail Line Information in Order Maintenance*.

Screen Option	Procedure
Advance to item inquiry	Select *Item Inquiry* for an item. See *Using Inventory Inquiry (DINI)*.
Change the Suppress notice flag for an item	Select *Suppress/Unsuppress Notice* for an item to unsuppress notice generation if it is currently suppressed, or to suppress notice generation if it is currently unsuppressed. The backorder notice will be eligible for generation when you select *Print Notices*. See *Suppressing and Unsuppressing Notices*.
Remove the cancel date from an item because the customer accepts the delay	Select *Customer Accepts Delay* for an item. See *Accepting the Delay*.
Cancel a group of order lines based on cancellation date or item	Select *Cancel Group* to display the *Cancel Backordered Lines Window*.
Accept the delay for all order lines with the same item	Select *Accept Delay* to display the *Accept Delay for All Customers Pop-Up Window*.
Generate backorder notices and the Backorder Cancellation Register	Select *Print Notices*. This option is available only if the *FTC--Second Notice Output (E68)* system control value is set to *FILE*. See *Purchase Order Layering and Backorder Notifications*, for report and notice samples and more information on generated emails.
Print the Order Cancellation List	Select *Print Report* to print the *Order Cancellation List by Item*.
Unsuppress a group of notices by date range or item	Select *Unsuppress Group* to display the *Unsuppress Notices Window*.

Display Backorder Notice Screen

Purpose: Use this screen to review details about a backorder notice.

How to display this screen: Select *Display* for an item at the *Work with Backorders Pending Cancellation Screen*.

Field	Description
Order number	The number of the order containing the backordered item. The ship-to number is separated from the order number by a hyphen. If there is only one ship-to address, the ship-to number will be *1*. Order number: numeric, 8 positions. Ship-to number: numeric, 3 positions.
Order line	The line on the order where the backordered item appears. Numeric, 3 positions.
Generation date	The date when the backorder notice was generated; or, if the *FTC--Second Notice Output (E68)* system control value is set to *FILE*, the date when the record was written to the file. Numeric, 6 positions (in user date format).

Field	Description
Cancellation date	The date when the order is flagged for cancellation. The system writes this date to the Backorder Cancellation Pending table when you generate backorders. **Note:** This date does not update automatically based on changes to the Cancel date on the order detail line. Numeric, 6 positions (in user date format).
Expected ship date	The Due date from the next purchase order you expect to be able to fulfill the order. The system writes this date to the Backorder Cancellation Pending table at the time you generate backorder cards; it is not updated if you run Batch PO Layering afterward. In this situation, the Expected ship date that appears on the order detail line in standard or streamlined order inquiry may differ from the date that appears here. Numeric, 6 positions (in user date format).
Printed	Indicates whether the backorder notice has been generated (printed, emailed, or sent through the *Outbound Email XML Message (CWEmailOut)*). For more information, see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Valid values are: • *selected* = The backorder notice has been generated. • *unselected* = The backorder notice has not been generated.
Print date	The date when the notice was generated. This field is blank if you have not yet generated the notice. Numeric, 6 positions (in user date format).
Suppress notice	Indicates whether the notice is eligible for generation when you select *Print Notices*. In order for notices to be eligible for generation, the *FTC--Second Notice Output (E68)* system control value must be set to *FILE*. Valid values are: • *selected* = Generation is suppressed; the notice is not eligible for generation. • *unselected* = Generation is not suppressed; the notice is eligible for generation.

Suppressing and Unsuppressing Notices

Purpose: The system creates each backorder pending cancellation record with the Sup (Suppress?) flag *selected*, so that generating backorder notices is suppressed. If the *FTC--Second Notice Output (E68)* system control value is set to *FILE*, you have the option of unsuppressing notice generation for these records, either individually or by group, and generating these notices.

Why are notices suppressed? The notices are created in a suppressed status so that you can avoid generating notices unnecessarily. For instance, you might generate backorder cancellation records in advance of their backorder dates so that you can review and work with backorder notices before generation (based on the *FTC--Number of Days Prior to Next Backorder Date to Generate Second Notice (E67)* system control value).

If you determine that you will actually be able to fulfill orders in a reasonable time, you can use the accept delay option for an individual order or for a group of orders. Accepting the delay allows you to reserve and fulfill the order. See *Accepting the Delay*.

Unsuppress a notice individually: To unsuppress an individual notice for generation, select *Suppress/Unsuppress Notice* for the item at the *Work with Backorders Pending Cancellation Screen*. The Sup flag changes from *Y* to *N*.

You can also unsuppress notices by group through the *Unsuppress Notices Window*.

Suppress a notice: Similarly, you can suppress a notice that has been unsuppressed by select *Suppress/Unsuppress Notice* for the item at the *Work with Backorders Pending Cancellation Screen*. The Sup flag changes from *N* to *Y*.

You cannot suppress notices by group.

Unsuppress Notices Window

Select *Unsuppress Group* at the *Work with Backorders Pending Cancellation Screen* to unsuppress a group of notices for generation.

Field	Description
Generation date range	The beginning and ending dates to include when unsuppressing backorder notifications for generation. Each backorder pending cancellation record created on or between these dates is unsuppressed. Two fields, numeric, 6 positions (in user date format); optional.
Item	The code representing the item whose backorder notifications you want to unsuppress for generation. If the item has SKUs, all SKUs are unsuppressed. Alphanumeric, 12 positions; optional.

Completing this screen: Select *Accept* to submit the unsuppress. A message indicates that the notices have been unsuppressed based on date range or item (if you selected both, the messages specifies unsuppressing by item). Optionally, select *Exit* to cancel.

The Sup flag for each selected backorder record changes to *N*.

If you completed both the generation date range fields and the Item field, only backorder records that meet *both* criteria are unsuppressed. In other words, if you select a range of dates between July 1 and August 1, and the item AB100, only backorder records for AB100 between those dates is unsuppressed; a backorder record for AB100 generated on August 2 remains suppressed.

Accepting the Delay

Purpose: You can remove an order line from a cancellation pending status through the *Work with Backorders Pending Cancellation Screen*. You might want to do so if a customer has communicated a willingness to accept the delay for the item, or if you determine that you will receive the item and be able to fulfill orders within a reasonable amount of time. You can accept delay for an individual order or for all order containing a specific item.

What happens when you accept the delay? The system:

- deletes the backorder record from the Backorder Cancellation Pending table (and the line disappears from the *Work with Backorders Pending Cancellation Screen*);
- deletes the cancellation date from the order detail line (visible by selecting *Display* for the item in standard order inquiry, *Detail* for the item in streamlined order inquiry, or *Change* for the item in order maintenance)
- writes an order transaction history message indicating that the customer has accepted the delay for the item (visible by selecting *Messages* in standard or streamlined order inquiry)
- adds the amount of days specified in the *Number of Days to Add for Accepted Delays (E69)* system control value to the next backorder date visible by selecting *Display* for the item in standard order inquiry, *Detail* for the item in streamlined order inquiry, or *Change* for the item in order maintenance). The order line will be eligible for pending backorder cancellation again if you are not able to fulfill the order by that date.

The order line is then eligible for reservation and fulfillment when you receive a purchase order containing the item.

Accepting the delay for a single order: Select *Customer Accepts Delay* for an item at the *Work with Backorders Pending Cancellation Screen* to accept the delay for the item on that order only. Select *OK* at the confirmation window to confirm the acceptance. If you accept, the system performs the updates described above for the order.

Accept Delay for All Customers Pop-Up Window

Select *Accept Delay* at the *Work with Backorders Pending Cancellation Screen* to accept the delay for all orders containing a specific item and SKU.

Instructions:

- Enter the item code for which you are accepting the delay and any SKU codes.
- Select *Accept* to accept the delay, or select *Exit* to cancel. If you accept, a message indicates:

Accept delay for all customers processed.

If you select *Accept*, the system performs the updates described under *Accepting the Delay* for each backorder pending cancellation for this item and SKU.

Cancel Backordered Lines Window

Purpose: Use this window to cancel order lines if you do not expect to receive the items in time to fulfill the orders. Using this option may be more efficient than canceling the order lines individually through order maintenance.

To cancel: Select *Cancel Group* at the *Work with Backorders Pending Cancellation Screen*.

> **Note:**
>
> You cannot cancel an item that is reserved through this pop-up window; you need to use order maintenance.

Field	Description
Select orders... (Number of days past cancellation date)	Indicates how many days it must be past the order line's cancellation date for the order line to be included in the cancellation request. This field defaults to *0* (any order whose cancellation date is earlier than or the same as the current date will be canceled). Numeric, 3 positions; required.
Item	Indicates the item to select for cancellation. If the item has SKUs, you must also enter SKU information. Item: alphanumeric, 12 positions; required. SKU: three 4-position fields; required if the item has SKUs.
Cancel reason	The cancel reason to use when canceling the orders containing this backordered item. Cancel reason codes are defined in and validated against the Cancel Reason Code table. If the cancel reason you enter is set to reduce demand, the order status will be *X* (closed) when the order is canceled; otherwise, the order status will be *C* (canceled). See *Establishing Cancel Reason Codes (WCNR)*. Numeric, 2 positions; required.
Recalculate freight?	Indicates whether to reduce the freight charge on the orders to reflect the item cancellation. Valid values are: • *Selected* (default) = Recalculate freight. • *Unselected* = Do not recalculate freight. The *Recalculate Freight Default (F62)* system control value controls the default setting of this field, but you can override this default.

Completing this window: Complete each field and select *Accept Cancel Request* to process the cancel request; otherwise, select *Exit* to cancel. A message displays informing you that the cancellation was processed. You can enter information for an additional cancel request, or select *Exit* to return to the *Work with Backorders Pending Cancellation Screen*.

The system cancels each order line (or the entire order, if the backordered item was the last open line on the order) using the cancel reason selected, and produces the *Orders Canceled After Second Notice Report*.

In addition, if a stored value card payment with an open, unused authorization amount exists on the order, the system generates a stored value card authorization reversal; see *Stored Value Card Authorization Reversal*.

Pick slip preparation: When you cancel an order, the system removes any pick slip preparation that has been applied to the order. When you cancel order lines, the system removes any pick slip preparation that has been applied to the order and then reevaluates the order for pick slip preparation; see *Preparing Orders for Pick Slip Generation*.

Printing the Order Cancellation List (PBRI)

Purpose: Use the *Order Cancellation List by Item* to review the order lines flagged for cancellation due to backorder.

You can select one of the fields on this screen, or leave these fields blank to include all orders pending cancellation for backorder on the report.

Select Items for B/O Cancellation Report Screen

How to display this screen: Select *Print Report* at the *Work with Backorders Pending Cancellation Screen*, enter *PBRI* in the Fast path field at the top of any menu, or select Print Backorder Cancellation Report from a menu.

Field	Description
Select vendor	The vendor whose purchase order was open when the item(s) first became backordered. Vendor codes are defined in and validated against the Vendor table; see *Working with Vendors (WVEN)*. Numeric, 7 positions; optional.
Select buyer	The buyer associated with the purchase order(s) that were open when the item(s) first became backordered. Buyer codes are defined in and validated against the Buyer table; see *Working with Buyers (WBUY)*. Alphanumeric, 3 positions; optional.
Select item	The item that is backordered. You need to enter only the base item code for SKUed items. Item codes are defined in and validated against the Item table; see *Performing Initial Item Entry (MITM)*. Alphanumeric, 12 positions; optional.

Completing this screen: After completing any desired fields, select *Accept* to generate the report. The job *BO_CN_LIST* produces the *Order Cancellation List by Item*.

Processing Item Substitutions (PSUB)

Purpose: Use the Process Substitute Items menu option to cancel any order lines for a given item and add a substitute item to each order.

Overview: When you use this menu option, you specify the item to cancel, the item to add, and the cancel reason to use for the substitution. Only open, unreserved order lines are eligible for item substitution. Items that reserve automatically, such as membership items, are not eligible. Also, order lines that have been submitted to Order Orchestration for fulfillment are not eligible; see *Order Orchestration Integration* for more information.

Optionally, you can also:

- select only orders with certain shippers
- set a maximum number of units to substitute
- use a different price for the substitute item or add it at no charge
- recalculate freight
- add pick slip messages for the orders

This menu option generates a batch job which processes the item substitution and produces a report listing each affected order.

Quotes: Order lines that are on quotes are not eligible for item substitution; see *Entering Pre-Order Quotes* for an overview and required setup.

Retail pickup or delivery orders: Order lines are not eligible for item substitution if they are on retail pickup or delivery orders from Order Orchestration. See the *Order Orchestration Integration* for more information.

Cancellation email: The system generates an order or order line cancellation email or *Outbound Email XML Message (CWEmailOut)* to the customer if:

- you have specified an *Order Line Cancellation Email Program (K79)*, and
- the cancel reason code you use does not match the *Cancel Reason Code to Suppress Email (L08)*, and
- the customer is eligible to receive email notifications; see *When Does the System Generate an Email Notification?*

For more information, see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

See the *Order Cancellation Confirmation Email Sample and Contents* and *Order Line Cancellation Confirmation Email Sample and Contents* for more information.

In this topic:

- *Process Substitute Items Screen*
- *Order Updates*
- *Substitute Item Processing List*

Process Substitute Items Screen

How to display this screen: Enter *PSUB* in the Fast path field at the top of any menu or select Process Substitute Items from a menu.

Field	Description
Item/SKU (Item/SKU to be canceled)	Enter the item and SKU that should be canceled by the batch job. Only open or held, unreserved order lines are eligible for cancellation; if the line is partially reserved and partially backordered, or if it is sold out, the batch job will not cancel it. If the item you select for cancellation has a ship via override, the system will not add the substitute item with the same ship via override, unless the override ship via is specified in the Item table. If you do not enter a valid item code and SKU (if the item has SKUs), the screen displays an error message. See *Performing Initial Item Entry (MITM)* for more information on creating and working with items. **Note:** Substituting a set item will not cancel its component items. Item: 12 positions, alphanumeric; required. SKU: three 4-position fields; required if the item has SKUs.

Field	Description
Cancel reason code	Enter the cancel reason code to use when canceling the item. Cancel reason codes control whether you update demand for cancellations. If the cancel reason code reduces demand, the canceled order line will have a status of *X* (closed); otherwise, the line will have a status of *C* (canceled). Cancel reason codes are defined in and validated against the Cancel Reason Code table. See *Establishing Cancel Reason Codes (WCNR)*. Numeric, 2 positions; required.
Substitute item/SKU	Enter the item and SKU that should be added to the order as a substitute for the canceled item. The system does not validate that the substitute item you enter is available in sufficient quantity to fulfill the orders updated by the batch job. You can substitute a non-SKU'ed item with a SKU'ed item, or a SKU'ed item with a non-SKU'ed item, if necessary. If you do not enter a valid item code and SKU (if the item has SKUs), the screen displays an error message. See *Performing Initial Item Entry (MITM)* for more information on creating and working with items. If the substitute item is restricted from shipment to a country or state, the substitution will not be performed on orders with ship to addresses in the restricted area(s). See *Entering Additional Item Information* for more information on item country/state restrictions. **Note:** If you enter a substitute item that has restricted SKUs (the Restrict field at the *Create SKU 1 of 2 (With Overrides) Screen* is *selected*), the system displays an error message: `Cannot take orders for this item/SKU (xxxxxx xxxx).` Item: 12 positions, alphanumeric; required. SKU: hree 4-position fields; required if the item has SKUs.
Used canceled item's price	Indicates whether to apply the unit price of the canceled item to the substitute item. Valid values are: 1. *Selected* (default) = Use the canceled item's price for the substitute item. (Note: If the canceled item's price was zero, the substitute item will be added at no charge also.) 2. *Unselected* = Use a different price. If you *deselect* this field, you will need to *select* the Add item at no charge field or enter a price in the Substitute item price field.

Field	Description
Add item at no charge	Indicates whether to add the substitute item to the order at no charge. Valid values are: 1. *Selected* = Add the substitute item to the order at no charge. The Use canceled item's price field cannot be *selected* if this field is also *selected*. 2. *Unselected* (default) = Do not add the substitute item at no charge. You must either *select* the Use canceled item's price field, or complete the Substitute item price field.
Substitute item price	The unit price to use for the substitute item, if you are not simply using the canceled item's price or offering the substitute item at no charge. You cannot enter a substitute item price unless both the Use canceled item's price field and the Add item at no charge field are *unselected*; in this situation, the substitute item price is required. If the order total changes, the order will be subject to a credit check and may go on hold if, for instance, the customer paid by check and there is now a balance due for the new total. Numeric, 13 positions with a 2-place decimal; required if not using the canceled item price or no charge.
Price override (Price override reason code)	Enter the price override reason code to use when adding the substitute item to the order. Price override reason codes are defined in and validated against the Price Override Reason table; see *Establishing Price Override Reason Codes (WPOR)*. Alphanumeric, 1 position; required.
Recalculate freight	Indicates whether to recalculate freight on the order based on the item substitution. Valid values are: • *Selected* = Recalculate freight based on the new merchandise total after making the item substitution. • *Unselected* (default) = Do not recalculate freight. The *Recalculate Freight Default (F62)* system control value controls the default setting of this field, but you can override this default. **Tax:** The system recalculates tax regardless of the setting of this field.
Maximum number of substitute items to process	Enter the total number of units of the original item to cancel and replace with the substitute item. The system will cancel each complete order line for the item in chronological order by order date until it reaches this maximum. If the system cannot cancel a complete order line quantity on an order without exceeding the maximum you enter here, it skips that order line and selects the next available order line that will not exceed the maximum. For example, if there are two units remaining to cancel before exceeding the maximum, and the next order line is for five units, the system skips this order line and cancels the next order line for the item for a quantity of two or fewer. If each open order line for the original item exceeds the maximum number you specify here, the system does not cancel any of the order lines. Numeric, 5 positions; optional.

Field	Description
Pick message line 1 and 2	Up to two lines of messages to appear on pick slips for shipment of the substitute item. These messages are added to the order line messages for each updated order. You can review order line messages by selecting *Messages* for an item in order inquiry; see *Work with Order Line Messages Screen*. Alphanumeric, 40 positions each; optional.

Completing this screen: If you select *Accept* to submit the item substitution batch job, the system submits the job *MASS_SUB*. This job cancels each order line with the original item and adds the substitute item using the settings you entered on this screen. This job also produces the *Substitute Item Processing List*.

Order Updates

In addition to canceling the original item and adding the substitute item, the batch job updates each affected order as follows:

Order history: An order history message displays on the *Display Order History Screen*:

LINE 003 SUBSTITUTED FOR LINE 002

The user ID of the person who ran the item substitution batch job displays next to the message.

If the order goes on hold as a result of the new item price, order history messages will be available for review:

```
3/05/06 H SYS HLD---BALANCE DUE HOLD - SYSTEM HOLD HTRUMAN
```

```
3/05/06 W User price override - Order line 11 100.00 HTRUMAN
```

```
3/05/06 M Order was maintained 341.00 HTRUMAN
```

Order line history: The *ADD* and *CANCEL* transactions for each affected line display on the *Display Order Line History Screen*. The user ID of the person who ran the item substitution batch job displays next to the transaction.

Order line messages: Any pick slips messages you entered at the Process Substitute Items screen display on the Work with Order Line Messages screen. You can display this screen by selecting *Messages* for an item in order inquiry; see *Work with Order Line Messages Screen*.

Pick slip preparation: The system removes any pick slip preparation from the order and once the item substitution updates are complete, reevaluates the order for pick slip preparation; see *Preparing Orders for Pick Slip Generation*.

Stored value card authorization reversal: If a stored value card payment with an open, unused authorization amount exists on the order, the system may generate a stored value card authorization reversal; see *Stored Value Card Authorization Reversal*.

Processing and Purging Subscriptions

In this part:

- *Generating the Subscription Extract Table (WGSE)* describes the process of identifying the issue number of the subscriptions you want to send and creating a file of customers who should receive this issue.

- *Purging Subscriptions (MPCS)* describes how to purge closed (expired) or canceled subscriptions from the Customer Subscription table.

Generating the Subscription Extract Table (WGSE)

Purpose: The Generate Subscription Extract file function creates a table of customers who should be sent an issue of a subscription.

A record is created in the Customer Subscription table when you generate pick slips for a customer order containing a subscription item. See *Displaying More Options in OIOM* for more information on working with customer subscriptions.

Before you can sell subscriptions, you must first define a subscription item in the Item table and in the Item Subscription table. See *Working with Item Subscriptions (WISB)* for more information on working with subscription items.

When you generate the *Subscription Extract Table (CSSBEX)*, you have the option of selecting all open subscriptions, or you can select specific subscription items by issue number.

In this topic:

- *First Generate Subscription Extract File Screen*
- *Generate All Open Subscriptions*
- *Second Generate Subscription Extract File Screen (Selecting Issue Numbers)*
- *Subscription Extract Table (CSSBEX)*

First Generate Subscription Extract File Screen

Purpose: At this screen you have the option of writing all open Customer Subscription records to the Subscription Extract table, or selecting subscription items by issue number.

How to display this screen: Enter *WGSE* in the Fast path field at the top of any menu or select Generate Subscription Extract File from a menu.

Screen Option	Procedure
Select issue numbers for subscription generation	Select *By Item* for the Selected subscription items or all open? field to advance to the *Second Generate Subscription Extract File Screen (Selecting Issue Numbers)*
Generate all open subscriptions	Select *All open* for the Selected subscription items or all open? field. See *Generate All Open Subscriptions*.
Accept your entries and generate all open subscriptions	Select *Submit*. See *Generate All Open Subscriptions*.

Generate All Open Subscriptions

Follow these steps to select all open Customer Subscription records. To select specific issues of subscription items, see *Second Generate Subscription Extract File Screen (Selecting Issue Numbers)*.

1. Select *All open* for the Selected subscription items or all open? field at the *First Generate Subscription Extract File Screen*.
2. Select *Submit*. If records currently exist in the *Subscription Extract Table (CSSBEX)*, this window prompts you to confirm the reset.
3. *deselect* if you would like to clear all previous records from the *Subscription Extract Table (CSSBEX)*. *Select* if you would like to append new records to the end of the Subscription Extract table without clearing the table.
4. Select *OK* to continue with the extract. The system submits the job *SUBSCR_EXT* by selecting all open records from the Customer Subscription table (status = *O*). It then writes these records to the Subscription Extract table.

> **Note:**
>
> If you use *All Open* to select all open subscriptions, the system will change the status of the record in the Customer Subscription table to *X* (Closed) and will not record the first or last issue numbers or dates as they display at the *Work with Subscriptions Screen*. You might choose this option if you are turning over the Subscription Extract table to another service provider rather maintaining the subscription using Order Administration. If would like the record status to remain open and want to track first and last issue numbers and dates, you must use *By Item* to select subscriptions by issue number; see *Second Generate Subscription Extract File Screen (Selecting Issue Numbers)*.

Second Generate Subscription Extract File Screen (Selecting Issue Numbers)

Purpose: Use this screen to select issue numbers of subscription items to include in the Subscription Extract table.

How to display this screen: Select *By Item* for the Select subscription items or all open? field at the *First Generate Subscription Extract File Screen*.

Once you have selected a Customer Subscription record using *All Open* for all open items, the system changes the status of the record to *X* (Closed). This means that the record will no longer be selected when you generate the Subscription Extract table.

Field	Description
Iss (Issue)	The issue of the subscription you want to include in the Subscription Extract table. Numeric, 3 positions.
Item	The item code of the subscription item. Items are defined in and validated against the Item table. Subscription items have a *selected* Subscription and Non/inv (non-inventory) fields in the Item and Item/SKU tables. See *Performing Initial Item Entry (MITM)*. Alphanumeric, 12 positions; display-only.
SKU	The unique characteristics associated with the item, such as its color, size, width, etc. SKUs are defined in and validated against the Item/SKU table. Alphanumeric, three 4-position fields; display-only.

Field	Description
Description	The description of the subscription item, as defined in the Item records. **Note:** Extracting a subscription with a description longer than 40 positions is not currently implemented. Alphanumeric, 120 positions; display-only.
Sel (Selected?)	This field identifies whether you requested an issue of the subscription item. An asterisk (*) appears in the Sel column to the right of the selected subscription items. Alphanumeric, 1 position; display-only.

Instructions:

1. Enter the issue number next to a subscription item you want to select for the Subscription Extract table. An asterisk (*) appears in the Sel column to the right of the subscription item, and the subscription item moves to the top of the screen.
2. Repeat the above step for each subscription item you want to select by issue number. Selected subscription items appear in alphanumeric order at the top of the screen.
3. To reset your selections, select *Reject*. A pop-up window prompts you to confirm the reset.

Select *OK* to remove the issue number from each subscription item.

1. When you have entered all the issue numbers you would like to select, select *Accept*. If records currently exist in the *Subscription Extract Table (CSSBEX)*, a pop-up window prompts you confirm the reset.
2. *Deselect* if you would like to clear all previous records from the Subscription Extract table. *Select* if you would like to append new records to the end of the Subscription Extract table without clearing the table.
3. Select *OK* to continue with the extract. The system submits the job *SUBSCR_EXT* by selecting all records in the Customer Subscription table that match your selections. It then writes these records to the *Subscription Extract Table (CSSBEX)*.

Subscription Extract Table (CSSBEX)

For more information on individual fields, see *Creating and Updating Sold-to Customers (WCST)* and *Working with Item Subscriptions (WISB)*.

Field	Attributes	Comments
Company code	3 positions, numeric	
Order date	7 positions, numeric	
Sequence number	7 positions, numeric	

Field	Attributes	Comments
Customer sold to number	9 positions, numeric	
Sold to prefix	3 positions, alphanumeric	
Sold to first name	15 positions, alphanumeric	
Sold to initial	1 position, alphanumeric	
Sold to last name	25 positions, alphanumeric	
Sold to company name	30 positions, alphanumeric	
Sold to street address	32 positions, alphanumeric	
Sold to apartment number	10 positions, alphanumeric	
Sold to address line 2	32 positions, alphanumeric	
Sold to address line 3	32 positions, alphanumeric	
Sold to address line 4	32 positions, alphanumeric	
Sold to city	25 positions, alphanumeric	
Sold to state	2 positions, alphanumeric	
Sold to zip code	10 positions, alphanumeric	
Sold to PO Box	1 position, alphanumeric	*Y* or *N*
Sold to delivery code	1 position, alphanumeric	*B* (business), *R* (residential), or *N* (no distinction)
Sold to suffix	3 positions, alphanumeric	
Recipient customer number	9 positions, numeric	The recipient on an order can be a sold to address, customer ship to address, or order ship to address.
Recipient prefix	3 positions, alphanumeric	
Recipient first name	15 positions, alphanumeric	
Recipient initial	1 position, alphanumeric	
Recipient last name	25 positions, alphanumeric	
Recipient company name	30 positions, alphanumeric	
Recipient street address	32 positions, alphanumeric	
Recipient apartment number	10 positions, alphanumeric	
Recipient address line 2	32 positions, alphanumeric	
Recipient address line 3	32 positions, alphanumeric	
Recipient city	25 positions, alphanumeric	
Recipient state	2 positions, alphanumeric	
Recipient zip code	10 positions, alphanumeric	
Subscription start date	7 positions, numeric	Default start date is the order date
Date sent to service	7 positions, numeric	Set to zero
Source code	6 positions, alphanumeric	
Quantity	5 positions, numeric	The quantity is always *1*

Field	Attributes	Comments
Price	13 positions with a 2-place decimal; numeric	
Item code	12 positions, alphanumeric	
Item description	120 positions, alphanumeric	Extracting a subscription with a description longer than 40 positions is not currently implemented.
SKU	14 positions, alphanumeric	
Subscription status	1 position, alphanumeric	
Number of intervals	3 positions, numeric	
Rent name?	1 position, alphanumeric	*Y* or *N*
Mail name?	1 position, alphanumeric	*Y* or *N*
Issue number	3 positions, numeric	
Expiring issue number	3 position, numeric	
Option taken at Subscription Extract screen	5 positions, numeric	Valid values: *1* or *2*

Purging Subscriptions (MPCS)

Purpose: The Purge Customer Subscriptions is a “housekeeping” routine that you can use to delete any expired or canceled subscription records from the Customer Subscription table. This is necessary because these records remain on file until they are purged.

Purge Customer Subscriptions Screen

How to display this screen: Enter *MPCS* in the Fast path field at the top of any menu or select this option from a menu.

Instructions:

1. Enter the date through which you want to cancel subscriptions.
2. *Select* the Confirm prompt (that appears in the lower right of your screen). The system submits the *PURGE_SUBS* job and generates the *Purge Customer Subscription List*.

Memberships

In this part:

- *Membership Overview* provides a high-level overview of creating membership programs, assigning them to customers, and generating membership orders.
- *Working with Membership Types (WWMT)* describes the menu option you use to set up membership types for tracking, sorting, and revision control.
- *Working with Membership Programs (WWMP)* describes the menu option you use to set up membership programs in which you can enroll customers.

- *Working with Customer Memberships (WWCM)* describes the menu option you use to work with customer memberships, including creating, changing, working with included items, and changing status.
- *Generating Membership Orders (EGMO)* describes the menu options you use to create orders for customer memberships.
- *Printing the Expected Membership Orders Report (PEMO)* describes the menu option you use to generate this report and provides a sample.
- *Update Customer Memberships (MMCM)* describes how to update the source code and replace an item on existing customer memberships and, optionally, membership programs.

Working with Membership Types (WWMT)

Purpose: Use the Work with Membership Type menu option to define membership type codes. You can use these codes to group and identify membership programs for informational or reporting purposes, or as selection criteria when you are generating membership orders. See *Membership Overview*.

Loyalty memberships? The membership type also controls whether a membership program is a standard membership that you sell or create, or a loyalty membership, in which the system automatically evaluates whether each customer placing an order qualifies for the loyalty program based on order history.

You use different screens in *Working with Membership Programs (WWMP)* and *Working with Customer Memberships (WWCM)* for loyalty membership programs vs. standard programs.

Allow changes? For standard membership programs, the membership type also controls whether you can change any of the default settings from the membership program for individual customer memberships.

Which information cannot be changed? The information controlled by this setting includes the items included on generated orders, any discount, and the criteria the system uses to determine shipment intervals. If the membership program is assigned to a type that does not permit changes, this information is display-only for customer memberships you create and cannot be changed.

> **Note:**
>
> If a membership program is flagged to not allow changes, then it is important to specify a ship via code at the *Membership Program Screen* to default to customer memberships; otherwise, you will not be able to create customer memberships in *Working with Customer Memberships (WWCM)*, because there will be no ship via code, and the ship via code is a required field.

Which information can be changed? You will be able to change only:

- the customer membership's status
- the next release date for orders
- the alternate shipping address or recipient customer
- pay type information

> **Note:**
>
> Even if a membership program is flagged not to allow changes, you can still process updates through the *Update Customer Memberships (MMCM)* option.

In this topic:

- *Work with Membership Type Screen*
- *Membership Type Screen*

Work with Membership Type Screen

How to display this screen: Enter *WWMT* in the Fast path field at the top of any menu or select Work with Membership Type from a menu.

Field	Description
Type	A code representing a type of membership program. Alphanumeric, 2 positions; optional.
Description	The description of the membership type. Alphanumeric, 30 positions; optional.
Loyalty	Valid values: • *selected* = indicates a loyalty membership program type, which the system assigns automatically to customers based on the customer's order history. • *unselected* = you can sell membership programs of this type in order entry or create them through *Working with Customer Memberships (WWCM)*. Standard memberships can be used to generate membership orders, or they can be discount-only memberships. See *Loyalty Memberships* for an overview.

Screen Option	Procedure
Create a new membership type	Select *Create* to advance to the *Membership Type Screen* in Create mode.
Change a membership type	Select *Change* for a membership type to advance to the Membership Type screen in Change mode. At this screen, you can change the description or the Change customer membership flag, but not the type code itself. See *Membership Type Screen* for field descriptions.
Delete a membership type	Select *Delete* for a membership type to delete it. You cannot delete a membership type if it is assigned to any membership programs.

Screen Option	Procedure
Display a membership type	Select *Display* for a membership type to advance to the Membership Type screen in Display mode. You cannot change any information on this screen. See Membership Type Screen for field descriptions.

Membership Type Screen

Purpose: Use this screen in Create mode to create a new membership type.

How to display this screen: Select *Create* at the *Work with Membership Type Screen*.

Field	Description
Membership type	A code to identify a type of membership program. You can use these codes to group and identify membership programs for informational or reporting purposes, or as selection criteria when you are generating membership orders. Also, you use the membership type to distinguish standard membership programs from loyalty programs. Alphanumeric, 2 positions. Create mode: required. Change mode: display-only.
Description	The description of the membership program. Alphanumeric, 30 positions; required.
Change customer membership	Indicates whether the settings that default from a membership program of this type to each customer membership you create can be changed on an individual customer membership. Valid values are: • *Selected* = You can change the settings on a customer membership • *Unselected* = You cannot change the settings on a customer membership See *Working with Membership Types (WWMT)* for a discussion of the type of information you can or cannot change for a customer membership, depending on the setting of this field. • This setting applies only to standard membership programs, not to loyalty membership programs. • If a membership program is flagged to not allow changes, then it is important to specify a ship via code at the *Membership Program Screen* to default to customer memberships; otherwise, you will not be able to create customer memberships in *Working with Customer Memberships (WWCM)*, because there will be no ship via code, and the ship via code is a required field.

Field	Description
Loyalty	Indicates whether membership programs of this type are standard membership programs or loyalty memberships. Valid values are: • *Selected* = Membership programs of this type are loyalty memberships: the system automatically evaluates whether each customer who places an order qualifies for the loyalty program based on order history. • *Unselected* = You can sell membership programs of this type in order entry or create them through *Working with Customer Memberships (WWCM)*. Standard memberships can be used to generate membership orders, or they can be discount-only memberships. See *Loyalty Memberships* for an overview.

Working with Membership Programs (WWMP)

Purpose: Use the Work with Membership Programs menu option to create, review, or work with the templates for customer memberships.

Loyalty programs or standard memberships programs: The membership program Type assigned to a membership program identifies whether it is a loyalty program or a standard membership. In the case of loyalty memberships, the background jobs automatically evaluate whether each customer placing an order qualifies for the loyalty program based on order history and customer class. In the case of a standard membership program, you can create customer memberships by selling a membership item in order entry, or creating the customer membership one manually using the *Working with Customer Memberships (WWCM)* menu option. Standard membership programs can generate new orders for the customer on a periodic basis, or they can be discount-only.

You use different screens in Work with Membership Programs and *Working with Customer Memberships (WWCM)* for loyalty membership programs vs. standard programs.

Standard membership programs: The membership program specifies settings such as:

- **Order creation and/or discount:** You can set up membership programs in order to create orders periodically for participating customers, and/or to apply a discount to all orders for participating customers. A membership program can include either or both functions.
- **Template for customer membership:** The information you define for a membership program defaults when you create a new customer membership. This information can include shipment intervals, source code, ship via, and any specific items to include on the generated membership orders.
- **Ability to change customer membership:** If you assign a membership program to a membership type that permits changes, you can override the defaults for specific customer memberships. If the membership type does not permit changes, all of the membership program settings default and cannot be overridden. These settings include shipment interval or date, discount, and included items. See *Working with Customer Memberships (WWCM)*, for descriptions of each field.

Loyalty membership programs: The membership program specifies settings such as:

- **Date range:** Use the Effective start date to indicate how far back to go when evaluating a customer's order or sales totals for loyalty membership qualification. For example, you can set the start date to January 1 if you would like to include order or sales dollars for the current calendar year only.
- **Dollar value requirement:** You can set up loyalty membership based on total merchandise dollars ordered or total dollars sold (that is, shipped), and specify the required dollar value. You can also specify whether to subtract additional order activity, such as returns, cancellations, and soldouts, from the total merchandise dollar value. Depending on the type of dollar totals (order, sales, external) used to evaluate customers for loyalty membership, the evaluation takes place at during ORDR_ASYNC processing or BILL_ASYNC processing.
- **Customer class:** You can set up a customer class as a qualification for a loyalty program, either alone or in combination with a total dollar value.
- **Discount percentage and other benefits:** In addition to indicating a discount percentage to apply to the customer's orders, you can specify additional benefits, such as free freight, assignment of a special customer class, or a backorder priority. You can also enter a special message line to print on pick slips for customers in the loyalty program.

For more information: See *Membership Overview* for more information on how loyalty programs and standard membership programs work, and about required setup.

In this topic:

Work with Memberships Screen

Purpose: Use this screen to review the membership programs in your company, to create a new membership program, or to work with an existing membership program.

How to display this screen: Enter *WWMP* in the Fast path field at the top of any menu or select Work with Membership Program from a menu.

Field	Description
Membership ID	A code representing the membership program. Alphanumeric, 12 positions; optional.
Description	The description of the membership program. Alphanumeric, 30 positions; optional.
Start dt (Start date)	The first date when you can begin creating customer memberships for this membership program, or to include when calculating the customer's total order or sales to date in order to determine whether the customer qualifies for this loyalty program. Numeric, 6 positions (in user date format); optional.
End dt (End date)	The last date when you can create new customer memberships for this membership program. Numeric, 6 positions (in user date format); optional.

Field	Description
Type	The code representing the membership type of a program. You can use the membership type to identify loyalty programs, to further identify or group membership programs, or to indicate that membership settings are compulsory and cannot be changed for specific customers. See *Working with Membership Types (WWMT)* for an overview. Alphanumeric, 2 positions; optional.

Screen Option	Procedure
Create a new membership program	Select *Create* to advance to the *Enter Membership Program Window*.
Change header information for a membership program	Select *Change* for a membership program to advance to: 1. the Membership Program Screen (Change Mode) if it is a standard membership program type. You can change any information on this screen except the membership ID or type. See the *Membership Program Screen* for field descriptions. **Note:** Changing a membership program does not update any existing customer memberships or their generated orders. 1. the Loyalty Membership Program Screen (Change Mode) if it is a loyalty membership program type. You can change any information on this screen except the membership ID or type. See the *Loyalty Membership Program Screen* for field descriptions. **Note:** Changing a membership program does not update any existing customer loyalty memberships.

Screen Option	Procedure
Delete a membership program	Select *Delete* for a membership program to delete it. **Note:** You cannot delete a membership program associated with any active customer memberships. Instead, the system displays a message: `Active Customer Memberships exist - cannot delete.`
Display a membership program	Select *Display* for a membership program to advance to: 1. the Membership Program Screen (Display Mode) if it is a standard membership program type. You cannot change any information on this screen. See the *Membership Program Screen* for field descriptions. 2. the Loyalty Membership Program Screen (Display Mode) if it is a loyalty membership program type. You cannot change any information on this screen. See the *Loyalty Membership Program Screen* for field descriptions.
Work with items for a membership program	Select *Work with details* for a membership program to advance to the *Work with Membership Program Detail Screen*. **Note:** This option is not available for a loyalty membership program type.

Enter Membership Program Window

Purpose: Use this window to specify the name, description, and type of the membership program you are creating. Based on the membership type you select, the system determines whether to advance next to the *Membership Program Screen* if it is a standard membership program type, or the *Loyalty Membership Program Screen*, if it is a loyalty membership program type.

Differences between standard and loyalty membership programs: The background jobs assign loyalty memberships automatically to customers based on the customer's order history, while you can sell standard membership programs in order entry or through the *Working with Customer Memberships (WWCM)*. Standard memberships can be used to generate membership orders, or they can be discount-only memberships.

How to display this screen: Select *Create* at the *Work with Memberships Screen*.

Field	Description
Membership ID	Enter the unique code to identify a membership program. The code you enter cannot be assigned to an existing membership program. *Matching a membership program with an item for order entry:* You can create standard customer memberships through order entry by adding an item whose Membership flag is *selected* to the order. When you add the membership item to an order, the system displays a pop-up window for you to enter the membership ID. You can save a step in order entry by assigning the same name to both the membership program and the item; if there is a membership program whose name matches the membership item, this name defaults in the window. *Example:* You can create a membership program with an ID of *MEMB01* and also create a membership item named *MEMB01*. When you enter the item *MEMB01* in order entry, the correct membership ID defaults into the pop-up window. Alphanumeric, 12 positions; required.
Description	Enter the description of the membership program. You can change the description, if needed, on the next screen. Alphanumeric, 30 positions; required.

Field	Description
Type	Enter the membership type code that identifies: • *Loyalty membership program or standard program?* The membership type distinguishes a loyalty program, in which the background job automatically assigns customers to the program based on order history, from a standard membership program, which you can sell or create and use to generate membership orders and/or apply discounts. If the type indicates a loyalty program, you advance to the *Loyalty Membership Program Screen*; otherwise, you advance to the *Membership Program Screen*. • *Allow overrides?* The membership type indicates whether you can override program defaults for specific customer memberships. If the Change customer membership field for the membership type is *unselected*, the information that defaults from the membership program to the customer membership is compulsory and cannot be changed for specific customers. Related to standard membership programs only. • *Grouping and tracking:* You can also use the membership program type to group different membership programs. When you use the *Generating Membership Orders (EGMO)* menu option, you can specify one or more membership types for order generation (standard membership programs only). Membership types are defined in and validated against the Membership Type table; see *Working with Membership Types (WWMT)*. Alphanumeric, 2 positions; required.

Completing this screen: Complete each of the fields as described above and click *OK* to advance to the *Membership Program Screen* (for standard membership programs) or the *Loyalty Membership Program Screen* (for loyalty membership programs).

Membership Program Screen

Purpose: Use this screen in Create mode to create a new standard membership program, which you sell or create in order to generate periodic membership orders and/or to provide a discount. See *Membership Overview* for more information, including the difference between standard and loyalty membership programs.

If the membership type you specify at the *Enter Membership Program Window* is flagged as a loyalty type, you advance instead to the *Loyalty Membership Program Screen*. See *Membership Overview* for more information on different types of membership programs.

How to display this screen: Click *OK* at the *Enter Membership Program Window* after specifying a membership program type that does not have the Loyalty flag set. See *Membership Program Screen* for the screen you use to create a loyalty membership program.

Field	Description
Membership ID	A unique program to identify a membership program. See the *Enter Membership Program Window* for more information. Change screen: display-only.

Field	Description
Description	The description of the membership program. Your entry from the *Enter Membership Program Window* defaults, but you can override it. Alphanumeric, 30 positions; required.
Type	The type of membership program. You can use the membership type code to further identify or group membership programs. See the *Enter Membership Program Window* for more information. Alphanumeric, 2 positions; display-only.
Effective start date	The first date when you can begin creating customer memberships for this membership program. If you enter a start date, you must also specify an end date. Numeric, 6 positions (in user date format); optional.
Effective end date	The last date when you can create a new customer membership for this membership program. This field does not control the duration of customer memberships you create for the membership program. If you enter an end date, you must also specify an start date. Numeric, 6 positions (in user date format); optional.
Delay initial shipment	Indicates whether to delay the Next release date for customer memberships by the Shipment interval, or to use the current date as the Next release date. The Next release date indicates when to start generating membership orders for the customer through *Generating Membership Orders (EGMO)*. *Example:* You create a customer membership on June 28, and the Shipment interval is set to 30 days. If the Delay initial shipment flag is *selected*, the Next release date for the customer membership is set to July 28, and the membership generation program will not generate an order for the membership until then. If the Delay initial shipment flag is *unselected*, the Next release date for the customer membership is set to June 28, and you can generate an order for the membership the next time you use the membership generation program. Valid values: • *selected* = When creating a regular (non-loyalty) customer membership that specifies a Shipment interval, set the Next release date to the current date plus the Shipment interval • *unselected* = When creating a regular (non-loyalty) customer membership that specifies a Shipment interval, set the Next release date to the current date **Note:** This flag applies only to regular (non-loyalty) membership programs that generate orders, and only if the membership program specifies a Shipment interval rather than a Fixed shipment day.

Field	Description
Shipment interval	The minimum interval, in number of days, that the Generate Customer Membership Orders program should wait between generating orders for active customer memberships. The system uses this value to determine the Next release date to assign a customer membership after generating a new order. *Example:* If a customer membership's shipment interval is set to *30*, the Release date will be set to 30 days in the future after you generate an order. You cannot specify both a shipment interval and a fixed shipment day for a membership program. Numeric, 3 positions; required if you do not specify a Fixed shipment day.
Fixed shipment day	The day of the month when the *Generating Membership Orders (EGMO)* program should consider active customer memberships eligible for order generation. *Example:* If you set a membership program's fixed shipment day to *15*, the system initially sets a new customer membership's release date as follows: • if the current day of the month is 14 or earlier, the next Release date is set to the 15th of the current month. • if the current day of the month is 15 or later, the next Release date is set to the 15th of the following month. Each time you generate a new order for the customer membership, the Generate Customer Membership Orders program resets its Release date. You cannot specify both a shipment interval and a fixed shipment day for a membership program. **Note:** Your entry cannot be greater than *28*, to make sure that the customer memberships will be eligible for order generation during each month of the year. Numeric, 2 positions; required if you do not specify a shipment interval.

Field	Description
Discount percent	The percentage discount to apply to all orders for the customer who purchased the membership. The membership status must be active, and the Discount end date must not have been reached yet for the discount to apply (see *Discount duration*). This discount percentage defaults to the order header each time you enter a new order for the customer. If you create the customer membership by adding a membership item in order entry, this discount percentage applies to the price of the membership item itself, unless you flag the item as nondiscountable (*select* the Discountable flag for the item). See *Membership Overview* for a discussion of how membership discounts apply to orders. Also, see *Working with Customer Memberships (WWCM)* for more information on discounts. Numeric, 5 positions with a 2-place decimal; optional.
Discount duration	The number of months that the discount percentage will apply to customer orders. The system calculates the discount end date when you create a customer membership based on the current date. *Applies to active memberships only:* Regardless of the discount start and end dates on a customer membership, the system applies a discount to orders only if the customer membership is currently active. Numeric, 2 positions; optional.
Default source code	The source code to default onto orders created from customer memberships. The source code you enter here defaults onto customer memberships you create, but you can override it there if the membership type allows it. You can also update the source code for existing customer memberships and the membership program itself through the *Update Customer Memberships (MMCM)* option. If this source code matches the source code in the *Default Unknown Source Code (I58)* system control value, the system updates the source code on the order header to the source code associated with the offer on the first order detail line; see *Default Unknown Source Code Logic*. Source codes are defined in and validated against the Source Code table. See *Working with Source Codes (WSRC)*. Alphanumeric, 9 positions; required.

Field	Description
Ship via	The ship via to default onto orders you create through customer memberships. The ship via code you enter here defaults onto customer memberships you create, but you can override it there if the membership type allows it. **If you do not specify a ship via code here:** • When you create a customer membership in order entry: The system uses the ship via code currently on the order header as the ship via for the customer membership. • When you create a customer membership in *Working with Customer Memberships (WWCM)*: You will need to specify a ship via for the customer membership. **Note:** If you do not specify a ship via code here and if you use a membership type that does not allow changes, then you will not be able to create customer memberships in *Working with Customer Memberships (WWCM)*, because there will be no way to specify the ship via to use. *Auto-selection of best way ship via:* If the ship via for the customer membership matches the *Best Way Ship Via for Auto-Assignment (J67)*, the system automatically selects the "best way" ship via with the lowest overall shipping costs when you generate a membership order. However, in this situation, the *Order Total Window (Reviewing the First Order Total)* displayed in order entry or in *Working with Customer Memberships (WWCM)* does not include any shipping charges. See the *Best Way Ship Via for Auto-Assignment (J67)* system control value for a discussion on auto-assignment. Ship via codes are defined in and validated against the Ship Via table. See *Working with Ship Via Codes (WVIA)*. Numeric, 2 positions; optional.
Order type	The order type to default onto orders you create through customer memberships. The Generate Customer Membership Orders program will use the order type specified in the *Default Order Type (B28)* system control value if you do not enter an order type code here. You cannot override the order type for specific customer memberships. Order type codes are defined in and validated against the Order Type table. See *Establishing Order Types (WOTY)*. Alphanumeric, 1 position; optional.

Field	Description
Ship complete	Identifies whether all items on an order you create through a customer membership must ship together. Valid values are: • *Selected* = Order must ship complete; available items will be held until each item is available and the entire order can ship together. • *Unselected* = Items can be shipped as they become available; backordered items will be shipped at a later date. The Default ship complete flag system control value does not control the default setting of this field.

> **Note:**
>
> If you select *Exit* at this screen, you do not create the new membership program.

Loyalty Membership Program Screen

Purpose: Use this screen to create a loyalty membership. The system uses the information you enter at this screen to determine whether to automatically assign a customer to a loyalty membership; also, your entries here determine the benefits of the loyalty program. See *Membership Overview* for more information, including the difference between standard and loyalty membership programs.

How to display this screen: Click *OK* at the *Enter Membership Program Window* after specifying a membership program type that has the Loyalty flag set. See *Membership Program Screen* for the screen you use to create a standard membership program.

Field	Description
Membership ID	The membership ID you entered at the *Enter Membership Program Window*. Alphanumeric, 12 positions; display-only.
Description	The description of the program. Your entry from the *Enter Membership Program Window* defaults, but you can override it. Alphanumeric, 30 positions; required.
Type	The membership type code you entered at the *Enter Membership Program Window*. The description is to the right. Alphanumeric, 2 positions; display-only.

Field	Description
Effective start date	Indicates the earliest date to include when determining whether the customer has a sufficient order or sales dollar total to qualify for the loyalty membership for a loyalty program. *Evaluating order or sales history:* • *O (Orders)* program: the system adds the total merchandise dollar value of all orders from the effective start date to the current date, and compares this amount with the LTD dollars specified at this screen. Evaluation takes place during the Order Async. • *S (Sales)* program: the evaluation takes place the same way as an *O (Orders)* program, except that it is based on total dollars sold rather than dollars ordered. Evaluation takes place during the Billing Async. • *E (External)* program: the evaluation takes place the same way as an O (Orders) program, except that the evaluation takes place during the Order Async and Billing Async. *Adding dollar totals:* The system bases its evaluation on the records of order activity in the Order Billing History table. See the *Order Billing History Detail Screen* for more information on how the system updates this table. Also, see *Loyalty Memberships* for an overview of how customers are evaluated for loyalty membership. If you leave this field blank, the system does not restrict its evaluation by an effective start date; all order activity in the Order Billing History table is considered. Numeric, 6 positions (in user date format); optional.
Effective end date	The last date when the system should evaluate customers for loyalty memberships. If you leave this field blank, the system does not automatically stop evaluating customers for the loyalty program. Numeric, 6 positions (in user date format); optional.
Qualifying Values	
Customer class	The customer class, if any, that qualifies a customer for the loyalty program. If the customer is already assigned to this class and has exceeded the LTD dollars, if any, specified for the loyalty program, the system creates a loyalty membership for the customer. Customer classes are defined in and validated against the Customer Class table; see *Setting Up the Customer Class Table (WCCL)* for more information. Also, see the *First Create Sold To Customer Screen* for more information on assigning a customer class to a customer. • Not to be confused with the Customer class, if any, to assign to the customer as one of the *Benefits* of the loyalty membership. • You can specify either a qualifying Customer class, a qualifying LTD dollars, or both. If you specify both, the customer must meet both requirements in order to qualify for the loyalty program. Alphanumeric, 2 positions; optional (required if no LTD dollars amount is specified).

Field	Description
LTD dollars (life-to-date dollars)	The total merchandise dollar value of all orders or all shipments (based on the setting of the Orders/Sales/External field at this screen) required to qualify for the loyalty membership. If the Net returns/exchanges, Net cancels, or Net soldouts flags are *selected*, the total merchandise dollar value of these activities are subtracted from the total merchandise order or sales dollars when evaluating the customer. *Start date for qualifying dollar value:* The system uses the Effective start date for the loyalty program to determine the order activity to include in the qualifying dollar total. See *Loyalty Memberships* for a complete discussion. *Merchandise only:* The system includes the merchandise value, based on the actual selling price, when calculating the total order or sales dollar value. Additional charges, freight, tax, additional freight, and special handling are not included. Numeric, 13 positions with a 2-place decimal; optional (required if there is not a qualifying Customer class).
Orders/Sales/External	Indicates the evaluation method to use in order to determine whether a customer qualifies for the loyalty membership program. Valid values are: • *External* = Use total merchandise ordered since the Effective start date to evaluate whether a customer qualifies for a loyalty membership. If there is no Effective start date, include all of the customer's order dollars. Evaluated during the Order Async and Billing Async. • *Orders* = Use total merchandise ordered since the Effective start date to evaluate whether a customer qualifies for a loyalty membership. If there is no Effective start date, include all of the customer's order dollars. Evaluated during the Order Async. • *Sales* = Use total merchandise sold (that is, shipped) since the Effective start date to evaluate whether a customer qualifies for a loyalty membership. If there is no Effective start date, include all of the customer's sales dollars. Evaluated during the Billing Async. **Note:** See *Loyalty Memberships* for a discussion of loyalty program evaluation and examples. Typically, you would use only one evaluation method for all loyalty programs in effect within a company. Required.

Field	Description
Net returns/ exchanges	Indicates whether to subtract the total merchandise dollar value of returns or exchanges from the total order or sales merchandise total when evaluating whether a customer qualifies for a loyalty membership. Valid values are: • *Selected* = The system subtracts the total merchandise dollars returned or exchanged from the merchandise total (based on the setting of the Orders/Sales/External flag) in order to evaluate whether a customer qualifies for a loyalty membership. For example, the loyalty program requires $500 in merchandise sales. The customer's total sales since the Effective start date are $525. The customer's total returns since the Effective start date are $50. The result is that the customer is not qualified for the loyalty program ($525 - $50 = $475). • *Unselected* = The system does not consider the total merchandise dollar value of returns or exchanges when evaluating whether a customer qualifies for a loyalty membership. In the above example, the customer still qualifies for the loyalty membership based on the total sales of $525 since the Effective start date, regardless of any returns processed. *Return activity against orders before the Effective start date:* Return or exchange activity is evaluated based on the date of the return or the exchange itself, rather than the date of the original order. For example, you process a return of $50 in merchandise on January 31 against an order that was entered on December 30. The system is evaluating the customer for a loyalty program with an effective start date of January 1. The value of the $50 return is subtracted from the total dollar value since January 1, even though the order was originally entered before that date. *Exchange activity:* If this value is *unselected* and you process an exchange, the dollar value of the exchange, or replacement, item is included in the calculation of loyalty eligibility. For example, if the customer exchanges an item with a selling price of $50 for an item with the same selling price, this activity effectively increases the customer's total merchandise value to date by $50 if you do not net returns and cancellations.

Field	Description
Net cancels	Indicates whether to subtract the total merchandise dollar value of cancellations from the total order or sales merchandise total when evaluating whether a customer qualifies for a loyalty membership. Valid values are: • *Selected* = The system subtracts the total merchandise dollars canceled from the order or sales merchandise total (based on the setting of the Orders/Sales/External flag) in order to evaluate whether a customer qualifies for a loyalty membership. For example, the loyalty program requires $500 in merchandise sales. The customer's total sales since the Effective start date are $525. The customer's total cancellations since the Effective start date are $50. The result is that the customer is not qualified for the loyalty program ($525 - $50 = $475). • *Unselected* = The system does not consider the total merchandise dollar value of cancellations when evaluating whether a customer qualifies for a loyalty membership. In the above example, the customer still qualifies for the loyalty membership based on the total sales of $525 since the Effective start date, regardless of any cancellations processed. *Cancellation activity against orders before the Effective start date:* Cancellation activity is evaluated based on the date of the cancellation itself, rather than the date of the original order. For example, you process a cancellation of $50 in merchandise on January 31 against an order that was entered on December 30. The system is evaluating the customer for a loyalty program with an effective start date of January 1. The value of the $50 cancellation is subtracted from the total dollar value since January 1, even though the order was originally entered before that date. *Update demand flag:* A cancellation always reduces the total order merchandise amount if you use a cancel reason code whose Update demand? flag is *selected*. The result of this type of cancellation might be to make a customer ineligible for a particular loyalty program if it is based on the order total. *Update demand for order maintenance transactions?* If the Update Demand for Order Maintenance Transactions (C72) system control value is *unselected*, it is possible to understate the customer's total merchandise order dollars. Because the order dollar total in this situation does not increase if, for example, you add an item in order maintenance, processing a cancellation can have the effect of "double dipping" when the system subtracts the cancellation dollars from the order total. For example, a customer's total dollars ordered is $500.00. You add a $100.00 item in order maintenance, and then cancel it. Because the total dollars ordered was never increased by the $100.00 in order maintenance, the cancellation effectively reduces the customer's total dollars ordered to $400.00. For this reason, you might want to leave this flag unselected if the *Update Demand for Order Maintenance Transactions (C72)* system control value is *Unselected*.

Field	Description
Net soldouts	Indicates whether to subtract the total merchandise dollar value of soldouts from the total order or sales merchandise total when evaluating whether a customer qualifies for a loyalty membership. Valid values are: • *Selected* = The system subtracts the merchandise dollars sold out from the total order or sales merchandise total (based on the setting of the Orders/Sales/External flag) in order to evaluate whether a customer qualifies for a loyalty membership. For example, the loyalty program requires $500 in merchandise sales. The customer's total sales since the Effective start date are $525. The customer's total soldouts since the Effective start date are $50. The result is that the customer is not qualified for the loyalty program ($525 - $50 = $475). • *Unselected* = The system does not consider the total merchandise dollar value of soldouts when evaluating whether a customer qualifies for a loyalty membership. In the above example, the customer still qualifies for the loyalty membership based on the total sales of $525 since the Effective start date, regardless of any soldouts processed. *Soldout activity against orders before the Effective start date:* Soldout activity is evaluated based on the date of the soldout cancellation itself, rather than the date of the original order. For example, you sell out $50 in merchandise on January 31 against an order that was entered on December 30. The system is evaluating the customer for a loyalty program with an effective start date of January 1. The value of the $50 soldout is subtracted from the total dollar value since January 1, even though the order was originally entered before that date. *Update demand for order maintenance transactions?* If the *Update Demand for Order Maintenance Transactions (C72)* system control value is *unselected*, it is possible to understate the customer's total merchandise order dollars. Because the order dollar total in this situation does not increase if, for example, you add an item in order maintenance, selling out an item can have the effect of "double dipping" when the system subtracts the soldout dollars from the order total. For example, a customer's total dollars ordered is $500.00. You add a $100.00 item in order maintenance, and then sell it out. Because the total dollars ordered was never increased by the $100.00 in order maintenance, the sellout effectively reduces the customer's total dollars ordered to $400.00. For this reason, you might want to leave this flag *unselected* if the *Update Demand for Order Maintenance Transactions (C72)* system control value is *unselected*.
Benefits	
Discount percent	The discount percentage that a member of the loyalty program qualifies for. The system sets this percentage when it creates the customer loyalty membership, and it defaults to the order header each time you enter a new order for the customer. The discount percentage for a customer loyalty membership is displayed at the Loyalty Customer Membership Screen. Numeric, 5 positions with a 2-place decimal; optional.

Field	Description
Discount duration	The number of months that the discount specified for the customer membership should be applied automatically to the customer's orders. The system adds this number of months to the current date in order to set the Discount end date for the customer loyalty membership, displayed at the *Loyalty Customer Membership Screen*. Even if the customer membership status is *Active*, the discount does not automatically apply after this date. If you leave this field blank, the system does not stop applying the discount automatically. Numeric, 2 positions; optional.
Free freight	Indicates whether to provide free freight to customer who are assigned to the loyalty membership. If this flag is *selected*, the Calc freight flag is *unselected* when you enter an order for the customer. The free freight flag for a customer loyalty membership is displayed at the *Loyalty Customer Membership Screen*. **Note:** It is still possible for the customer to be charged additional freight even if freight is free.
Customer class	Indicates the customer class, if any, to assign to customers who are assigned to the loyalty membership. This customer class replaces the current class assignment, if any, for the customer. When you deactivate a loyalty membership, or the system deactivates one, the system does not automatically update the customer class currently assigned to the customer. The update occurs only at the time of activating a customer loyalty membership. Customer classes are defined in and validated against the Customer Class table; see *Setting Up the Customer Class Table (WCCL)* for more information. Also, see the *First Create Sold To Customer Screen* for more information on assigning a customer class to a customer. **Note:** Not to be confused with the Customer class, if any, to use as one of the *Qualifying Values* for the loyalty membership. Alphanumeric, 2 positions; optional.

Field	Description
Priority	The priority in which the system should evaluate this loyalty program compared to other current loyalty programs, where a lower number indicates a higher priority. If you are setting up multiple, graduated loyalty programs, you should assign a higher priority (lower number) to the ones with the higher dollar value requirement in order to ensure that the customer is assigned the highest-level loyalty program that he qualifies for. *Example:* You are setting up two loyalty programs: *PROGRAM2*, with a discount of 5%, requires a total order value of $1000; and *PROGRAM1*, with a discount of 10%, requires a total order value of $2000. You assign a priority of *1* to *PROGRAM1*, and a priority of *2* to *PROGRAM2*. Each time you process an order from a customer, the system first evaluates whether the customer qualifies for *PROGRAM1* with the higher discount percentage (priority *1*). If the customer does not qualify for *PROGRAM1*, the system then evaluates whether the customer qualifies for *PROGRAM2* and the lower discount percentage (priority *2*). If there are two current loyalty programs assigned the same priority, the system evaluates them in alphanumeric order based on Membership ID. Numeric, 3 positions; required.
Priority B/O	Indicates the default Priority, if any, that the system should set on the order header when you enter an order for a customer in this loyalty program. *9* indicates the highest priority, while *0* is the lowest priority. You can override this default in order entry. The Evaluate Backorders program uses the priority to determine which backorders to reserve first when inventory becomes available. See *Working with the EBO_ASYNC Job* for more information. Numeric, 1 position; optional.
Pick msg (pick message)	Enter the message, if any, to print on the pick slip for customers who are members of this loyalty program. This message prints in addition to any other messages selected for the pick slip. See *Performing Pick Slip Generation* for more information on generating pick slips. Alphanumeric, 60 positions; optional.

Work with Membership Program Detail Screen

Purpose: Use this screen to work with the items that default onto customer membership orders.

How to display this screen: Select *Work with Details* for a membership program at the *Work with Memberships Screen*.

> **Note:**
>
> This option is not valid for loyalty memberships. See *Membership Overview* for more information.

Field	Description
Membership ID	The code representing the membership program. Alphanumeric, 12 positions; display-only.
Description (Unlabeled field to the right of the membership ID)	The description of the membership program. Alphanumeric, 30 positions; display-only.
Item	An item to include on orders you create for customer memberships. **Note:** You can replace an item for existing customer memberships and the membership program itself through the *Update Customer Memberships (MMCM)* option. Alphanumeric, 12 positions; optional.
SKU	The item's unique characteristics, such as its color and size. Alphanumeric, three 4-position fields; display-only.
Order quantity	The quantity of the item to include on each order you create for customer memberships. Numeric, 5 positions; display-only.
Rot (Rotation)	The interval when the item should be included in an order. A rotation of *1* indicates that the item should be included on the first order you generate, and will always be included if there are no items with a rotation higher than *1*. A rotation of *2* indicates that the item should be included on the second order, and so on. A rotation of *0* indicates that the item should be included on every order. If the *Generating Membership Orders (EGMO)* program attempts to generate an order for a customer membership and there are no eligible rotations (either the current rotation number or a rotation of zero), then the program does not generate the order, and the customer membership is listed on the *Memberships in Error Report*. Numeric, 3 positions; display-only.
# of times (Number of times to include)	The total number of times to include the item on an order. If this field is blank, there is no limit to the number of times to include the item. Numeric, 3 positions; display-only.
N/C (No charge)	Indicates whether the item should be free of charge on orders you generate. Valid values are: • *Selected* = The item will be added to orders you generate free of charge • *Unselected* = The item will not be free of charge

Field	Description
Ovr rsn (Price override reason code)	The price override reason code for the system to use when adding the item to the order at no charge, or with an override price. Alphanumeric, 1 position; display-only.
Ovr price (Price override)	The price to charge for the item on orders you generate for customer memberships. You would specify a price override if you do not want the system to use the regular pricing hierarchy for membership orders. Numeric, 13 positions with a 2-place decimal; display-only.

Screen Option	Procedure
Enter a new item to include in the membership program	Select *Create* to advance to the *Membership Program Screen*.
Change an item included in the membership program	Select *Change* for an item to advance to the Membership Program Screen (Change Mode). At this screen, you can change anything but the membership ID. See *Membership Program Detail Screen*. **Note:** Changing an item on a membership program does not update any existing customer memberships or their generated orders.
Delete an item from a membership program	Select *Delete* for an item to delete it from the membership program. **Note:** Deleting an item on a membership program does not update any existing customer memberships or their generated orders.
Display an item	Select *Display* for an item to advance to the Membership Program Detail Screen (Display Mode). You cannot change any information on this screen. See the *Membership Program Detail Screen* for a field descriptions.

Membership Program Detail Screen

Purpose: Use this screen in Add mode to add an item to a membership program.

How to display this screen: Select *Create* at the *Work with Membership Program Detail Screen*.

Field	Description
Membership ID	The code representing the membership program. Alphanumeric, 12 positions; display-only.
Item	The item to include on orders you create for customer memberships. Item codes are defined in and validated against the Item table. See *Performing Initial Item Entry (MITM)*. Alphanumeric, 12 positions; required.
SKU	The item's unique characteristics, such as its color and size. Alphanumeric, three 4-position fields; required if the item has SKUs.
Order quantity	The quantity of the item to include on each order you create for a customer membership. Numeric, 5 positions; required.
Rotation	The interval when the item should be included in an order. A rotation of *1* or zero indicates that the item should be included on the first order you generate. A rotation of *2* indicates that the item should be included on the second order, and so on. Once you have generated as many orders as the highest rotation number assigned to an item, items on rotation *1* are selected and the cycle begins again. The default rotation is *1*. A rotation of *0* indicates that the item should be included on every order you generate. If each item on the membership has a rotation of *1*, they will all be included on each generated order. If the *Generating Membership Orders (EGMO)* program attempts to generate an order for a customer membership and there are no eligible rotations (either the current rotation number or a rotation of zero), then the program does not generate the order, and the customer membership is listed on the *Memberships in Error Report*. Numeric, 3 positions; optional.
# of times to include	The total number of times to include the item on an order. If this field is blank, there is no limit to the number of times to include the item. Numeric, 3 positions; optional.
No charge	Indicates whether the item should be added free of charge to an order you generate. Valid values are: • *No Charge* = The item will be added to orders you generate free of charge • *Priced* = The item will not be free of charge; use a price override or use the regular pricing hierarchy If you select *No Charge* for this field, you need to complete the price override reason code, below.

Field	Description
Price override code	The price override reason code for the system to use when adding the item to the order at no charge, or with an override price. Price override reason codes are defined in and validated against the Price Override Reason Code table. See *Establishing Price Override Reason Codes (WPOR)*. Alphanumeric, 1 position; required if the item is flagged as "no charge" or if you enter a price override.
Price override	The price to charge for the item on orders you generate for customer memberships. You would specify a price override if you do not want the system to use the regular pricing hierarchy for membership orders. Numeric, 13 positions with a 2-place decimal; optional.

Note:

Adding an item to a membership program does not update any existing customer memberships or their generated orders.

Working with Customer Memberships (WWCM)

Purpose: Use the Work with Customer Memberships menu option to review or change customer memberships. Available options for standard membership programs include:

- creating a new customer membership
- changing the terms of the membership, including dates and payment information
- working with items for the membership
- activating, deactivating, or canceling a membership
- advancing to standard order inquiry for the customer membership

Settings default from membership program: The settings you have defined for the standard membership program default for each new customer membership you create. These settings include dates, frequency of shipments, discount, and included items. However, you can override these defaults for standard membership programs as long as the membership type permits it. See *Working with Membership Programs (WWMP)*.

You can also update the source code and replace an item on existing customer memberships through the *Update Customer Memberships (MMCM)* option.

Create through quote or order entry: You can also use quote or order entry to create a standard customer membership. See *Membership Overview* for general information, *Entering Customer Memberships in Order Entry* for detailed information, and *Entering Customer Memberships in Order Entry* for information on the differences between quote an order entry.

Deleting memberships on quotes: If you delete a membership item on a quote in entry or maintenance, the system also deletes the customer membership.

Canceling memberships through order maintenance: When you cancel a membership item in order maintenance or cancel the order or quote that contains the membership item, the system cancels the customer membership created by the membership item if possible.

However, the system cannot cancel the membership if the customer membership is currently in *In process* status. A customer membership is in *In process* status if:

- The membership order generation process is currently running and the customer membership is eligible for order generation, or
- A generated order is currently suspended in an order batch.

In either situation, you will need to:

- Cancel the customer membership through the process described under Canceling a Customer Membership.
- Cancel any generated membership orders that you do not want to ship to the customer.

See *Canceling a Membership Item* for more information on the process of canceling a membership item.

Loyalty memberships: Unlike standard customer memberships, customer loyalty memberships are created automatically based on the customer's order history, sales history, or customer class. You cannot create a customer loyalty membership through this menu option. See *Loyalty Memberships* for an overview.

In this topic:

– *Change or Create Options for a Membership Recipient*

Work with Customer Memberships Screen

How to display this screen: Enter *WWCM* in the Fast path field at the top of any menu or select Work with Customer Memberships from a menu.

Field	Description
Customer #	A unique number to represent the sold-to customer who ordered the membership. **Ghost customers:** If you enter the customer number of a ghost customer, the scan screen does not display any memberships; this is because a merge/purge has assigned any memberships using that customer number to the "target" customer. You can identify a ghost customer by the setting of the *Ghost* flag. Numeric, 9 positions; optional.
Membershp ID (Membership ID)	A code that identifies the membership program in which the customer is enrolled. Alphanumeric, 12 positions; optional.
Type	A code that identifies the type of membership program. You can use membership types to group membership programs, to indicate whether any of the settings for the membership program can be overridden for specific customer memberships, or to identify a membership program as a loyalty program. See *Working with Membership Types (WWMT)* for more information. Alphanumeric, 2 positions; display-only.
Status	The current status of the customer membership. Valid values are: • *Active* = The customer membership is active; the system creates new membership orders and/or applies any discount if the Discount end date has not been reached. **Note:** Customer memberships associated with a quote display in an active status; however, the system does not generate a membership order until the quote is converted to an order; see *Entering Customer Memberships in Quote Entry* and *Converting Quotes to Orders*. • *Inactive* = The customer membership is associated with a quote that has not been converted to an order or the customer membership has been deactivated; however, you can reactivate it. The system does not generate membership orders for an inactive membership, and any discount does not apply. • *In process* = The membership order generation process is currently processing and this customer membership is eligible for order generation, or the membership order is currently in a suspended order batch. You need to correct the errors or delete the order and then accept the order batch to change the status of the customer membership. See *Working with an Order Batch* for more information on batch order entry. **Note:** This status does not apply to loyalty memberships.

Field	Description
	• *Canceled* = The customer membership has been canceled before it was completed. You can cancel a customer membership by selecting *Cancel* for it at this screen. You can also cancel a standard or discount-only membership by canceling the originating membership item or order in order maintenance; see *Canceling a Membership Item* for more information. **Note:** Canceling the items for a customer membership changes the status to Complete, not Canceled. • *Complete* = The number of specified rotations for the customer membership has been reached, or all items on the customer membership have been canceled. If you do not specify the number of times to include for each item on the customer membership, the system does not consider the membership complete. **Note:** This status does not apply to loyalty memberships. See Changing Customer Membership Status, Rotation or Release Date. Optional.
Shp int (Shipment interval)	The minimum interval, in number of days, that the *Generating Membership Orders (EGMO)* program should wait between generating orders for this customer membership. Standard membership programs only. Numeric, 3 positions; display-only.
Int day (Interval day of the month)	The day of the month when the *Generating Membership Orders (EGMO)* program should consider the customer membership eligible for order generation. Standard membership programs only. Numeric, 2 positions; display-only.
# shp (Number of shipments)	The number of membership orders that have been generated to date for the customer membership. Standard membership programs only. Numeric, 3 positions; display-only.

Field	Description
Next rot (Next rotation)	The next rotation due to be included when you generate membership orders. You assign a rotation to an item on a customer membership to indicate when it should be included in an order. Standard membership programs only. **Note:** If the membership does not have differing rotations (that is, each order includes the same item(s)), the next rotation is always *1*. Numeric, 3 positions; display-only.
Next rel date (Next release date)	The next date when the *Generating Membership Orders (EGMO)* program should consider the customer membership eligible for order generation. The system calculates this date based on the schedule defined for the membership. Also, you can change the next release date by selecting *Change release date/rotation* for a customer membership; see Changing Customer Membership Status, Rotation or Release Date. Standard membership programs only. Numeric, 6 positions (in user date format); display-only.
Last ord date (Last order date)	The last date when an order was generated for the customer membership. Standard membership programs only. Numeric, 6 positions (in user date format); display-only.
Customer name (Unlabeled field below the customer number)	The name of the customer who ordered the membership, or qualified for the loyalty membership. Alphanumeric, 41 positions; display-only.

Field	Description
Recipient (Unlabeled field to the right of the sold-to customer name) or program description	This field displays: • The name of the customer to receive the membership orders, if different from the customer who ordered the membership. Standard membership programs only. The company name is displayed if there is no first and last name; or, • The description of the membership program if there is not a separate shipping address, or if the customer membership is for a loyalty membership program. You can set up these types of recipients for standard memberships: • *Alternate address* = A different shipping address to use for orders you generate for all or part of the term of the membership, such as a vacation address. See *Alternate Shipping Address Screen (Change Mode)*. • *Recipient customer* = A separate customer in your customer table who receives the membership, perhaps through a gift. See Customer Membership Recipient Screen (Change Mode). You can also create a recipient for a customer membership when you create the membership in order entry and select a recipient customer for the order. • *Customer ship-to* = An additional shipping address associated with the sold-to customer who placed the order. Unlike the alternate address, the customer ship-to is permanently associated with the sold-to customer, and is not restricted to a particular order or membership. To send the membership orders to a customer ship-to address, you must complete the Recipient and Ship to # fields at the *Customer Membership Screen (Change Mode)*. You can also create a ship-to when you create the membership in order entry by selecting a shipping address from the address book Alphanumeric, 30 positions; display-only.

Screen Option	Procedure
Create a new customer membership	Select *Create* to advance to the *Create Customer Membership Window*. **Note:** This option is not available for loyalty customer memberships. See *Loyalty Memberships* for an overview.

Screen Option	Procedure
Change a customer membership	Select *Change* for a membership to advance to the *Customer Membership Screen (Change Mode)* in Change mode for standard memberships, or the *Customer Membership Detail Screen (Change Mode)* for loyalty memberships. **Note:** You cannot change any information for a customer membership if the program type does not have the Change customer membership flag *selected*; in this situation, you advance to the same screen whether you select *Change* for or select *Display* for a customer membership.
Cancel an active customer membership	Select *Cancel* for an active membership to display the Confirm Cancel Request pop-up window. See Canceling a Customer Membership. **Note:** Once you cancel a customer loyalty membership, you cannot change its status or create a new loyalty membership. Only the system can create customer loyalty memberships.
Delete a customer membership	Select *Change* for a membership to advance to the *Customer Membership Screen (Change Mode)* in Change mode; then, select *Delete*. See *Deleting a Customer Membership*. **Note:** This option is not available for loyalty customer memberships.

Screen Option	Procedure
Display a customer membership	Select *Display* for a standard customer membership to advance to the Customer Membership Screen in Display mode for standard memberships or the *Customer Membership Detail Screen (Change Mode)* for loyalty memberships. You cannot change any information on these screens. You can advance to these screens regardless of the membership's status. See *Customer Membership Screen (Change Mode)* for field descriptions for the Customer Membership Screen in Display mode.
Reactivate an inactive customer membership	Select *Activate* for an inactive membership to display the Override Release Date pop-up window (standard membership programs only) and change the membership's status to Active. See *Activating a Customer Membership*.
Change the next release date or rotation for a customer membership	Select *Change release date/rotation* for a membership to display the Override Release Date pop-up window. See *Changing Release Date or Rotation for a Customer Membership*. **Note:** This option is not available for loyalty customer memberships.
Deactivate an active customer membership	Select *Deactivate* for an active membership to change its status to Inactive. See *Deactivating a Customer Membership*.
Work with items for a customer membership	Select *Details* for a standard membership to advance to the *Customer Membership Details Screen*. **Note:** This option is not available for loyalty customer memberships.
Review orders generated for the customer membership	Select *Orders for customer* for a membership to advance to the *Display Membership Orders Screen*. **Note:** This option is not available for loyalty customer memberships.

Create Customer Membership Window

Purpose: Use this window to indicate the customer and membership program when you are creating a new customer membership.

> **Note:**
>
> - This option is not available for loyalty customer memberships. See *Loyalty Memberships* for an overview.
> - You cannot create a standard customer membership from the *Work with Customer Memberships Screen* if the membership type does not allow changes and there is no default ship via specified for the membership program, because the ship via code is a required field. See Working with Membership Programs (WWMP) for more information on setting up membership programs.

How to display this screen: Select *Create* at the *Work with Customer Memberships Screen*.

Field	Description
Customer #	The number that identifies the customer sold-to who is ordering the membership. You can select the *Customer#* box to advance to: • the Select Customer Sold To pop-up window if the *ORCE Customer Integration (L37)* system control value is blank; this window supports scanning on various types of information, such as postal code, name, telephone number and email address. • the *Customer Scan Screen* if the *ORCE Customer Integration (L37)* system control value is set to *INTERACT*; see that screen for more information. Customer sold-to numbers are defined in and validated against the Customer Sold To table. See *Creating and Updating Sold-to Customers (WCST)*. If you enter the number of a ghost customer, the system displays the *Ghost Customer Warning Pop-up Window*. Numeric, 9 positions; required.
Membership ID	The code that identifies a membership program. The settings you have defined for the membership program default to the new customer membership program. You can override these defaults unless the membership program's type is flagged to prohibit changes. Membership programs are defined in and validated against the Membership table. See *Working with Membership Programs (WWMP)*. You cannot enter a membership ID whose membership type is flagged as a loyalty program. See *Loyalty Memberships* for an overview. Alphanumeric, 12 positions; required.

Completing this window: You advance to the *Customer Membership Screen (Change Mode)*.

Ghost Customer Warning Pop-up Window

A ghost customer is a customer whose records have been merged with the records of a matching customer when you performed a Merge/Purge. The ghost customer was the source customer in the merge; records for this customer were merged with the records for a matching target customer. When performing the merge you can elect to flag a source customer as a Ghost on the *Work with Source Customers Screen*. Ghost customer records are retained in the Customer Sold To table for informational purposes, but they do not represent the most recent customer order information from the merged (target customer) records.

When you enter the number of a ghost customer, the pop-up Warning Window displays information on the ghost customer.

Select *Continue* to return to the *Create Customer Membership Window* with the target customer number entered on the screen. For example, if you enter *202*, a ghost customer, the system will display the warning window informing you that customer *202* has been merged into customer *137*. When you continue with the create customer membership process, customer *137* will default on the Create Customer Membership Window.

See *Working with Merge/Purge Sold-to Names (MMCS)* for more information on the merge/purge function.

> **Note:**
>
> The system displays a message such as `Cannot manually create cust.` if the membership ID you enter specifies a loyalty program. You cannot create a customer loyalty membership. See *Loyalty Memberships* for an overview.

Customer Membership Screen (Change Mode)

Purpose: Use this screen to review or override the settings for the standard membership program that have defaulted for a customer membership.

- If the membership program's type prohibits changes, you will not be able to override any of the settings that have defaulted from the membership program.
- You cannot create a standard customer membership at this screen if the membership type does not allow changes and there is no default ship via specified for the membership program, because the ship via code is a required field. See *Working with Membership Programs (WWMP)* for more information on setting up membership programs.

How to display this screen: Complete the *Create Customer Membership Window*, specifying a standard membership program as the Membership ID.

Change a membership: You can also advance to this screen by selecting *Change* for a standard customer membership at the *Work with Customer Memberships Screen*. You can change a membership only if the membership status is Active (*A*) or Inactive (*I*). You cannot change memberships that are Canceled (*C*) or Complete (*X*), or if the membership type prohibits changes.

Field	Description
Customer #	A unique number to identify the customer who ordered the membership. Numeric, 9 positions; display-only.
Customer name	The name of the customer who ordered the membership. Alphanumeric, 41 positions; display-only.
Order#	The order on which the customer ordered the customer membership. This field does not appear if you created the customer membership through the *Working with Customer Memberships (WWCM)* menu option. Numeric, 8 positions; display-only.
Membership ID	A code to identify the membership program. Alphanumeric, 12 positions; display-only.
Description (Unlabeled field to the right of the membership ID)	The description of the membership program. Alphanumeric, 30 positions; display-only.
Membership type	A code to identify the type of membership program. You can use membership types to group membership programs, to control whether it is possible to override membership program defaults for specific customer memberships, or to flag loyalty membership programs. See Working with Membership Types (WWMT) for more information. Alphanumeric, 2 positions; display-only.
Status	The status of the customer membership. Valid values are: • *Active* = The customer membership is active; the system will create new membership orders and apply any discount if the Discount end date has not been reached. • *Inactive* = The customer membership is associated with a quote or has been deactivated, but you can reactivate it. The system does not generate membership orders for an inactive membership, and any discount does not apply to orders you enter for the customer. • *In Process* = A membership order is currently in a suspended order batch. You need to correct the errors or delete the order and then accept the order batch to change the status of the customer membership. • *Cancelled* = The customer membership has been canceled before it was completed. You can cancel a standard customer membership by selecting *Cancel* at the Work with Customer Memberships Screen or by Canceling a Membership Item in order maintenance. (*Note:* Canceling the items for a customer membership changes the status to Complete, not Canceled.) • *Complete* = The number of shipments specified rotations for the customer membership are complete, or all items on the customer membership have been canceled. If you do not specify the number of times to include for each item on the customer membership, the system will not consider the membership complete. See Changing Customer Membership Status, Rotation or Release Date. Display-only.

Field	Description
Created on	The date when you created the customer membership. Numeric, 6 positions (in user date format); display-only.
Changed on	The most recent date when you entered a change for the customer membership. Numeric, 6 positions (in user date format); display-only.
Cancel reason	The reason code you used when canceling the customer membership or the membership item (see *Canceling a Membership Item* for information). Included only for canceled memberships. Cancel reason codes are defined in and validated against the Cancel Reason Code table. See *Establishing Cancel Reason Codes (WCNR)*. Alphanumeric, 2 positions; display-only.
Description (Unlabeled field to the right of the cancel reason code)	The description of the cancel reason code. Included only for canceled memberships. Alphanumeric, 30 positions; display-only.
Cancelled on	The date when you canceled the customer membership. Included only for canceled memberships. Numeric, 6 positions (in user date format); display-only.
Shipment interval	The minimum interval, in number of days, that the Generate Customer Membership Orders program should wait between generating orders for this membership. If a shipment interval was specified for the membership program, it defaults here. *Example:* If a customer membership's shipment interval is set to *30*, the Generate Customer Membership Orders program will consider the membership eligible for a new order if 30 days have passed since the last order was generated. You cannot specify both a shipment interval and a fixed shipment day for a membership program. You can override the shipment interval only if the membership program's type allows changes. See *Working with Membership Programs (WWMP)*. Numeric, 3 positions; required if you don't specify a fixed shipment day, or display-only.
Fixed shipment day	The day of the month when the *Generating Membership Orders (EGMO)* program should consider the customer membership eligible for order generation. If a fixed shipment day was specified for the membership program, it defaults here. *Example:* If you set the membership's fixed shipment day to *15*, the system initially sets a release date as follows: • if the current day of the month is 14 or earlier, the next release date is set to the 15th of the current month. • if the current day of the month is 15 or later, the next release date is set to the 15th of the following month. The system recalculates the Next release date if you change the Fixed shipment day. *Order generation:* Each time you generate a new order for the customer membership, the Generate Customer Membership Orders program resets its release date as described above.

Field	Description
	Validation: You cannot specify both a shipment interval and a fixed shipment day for a customer membership. Also, your entry cannot be greater than *28*, to make sure that the customer membership will be eligible for order generation during each month of the year. You can override the fixed shipment day only if the membership program's type allows changes. See Working with Membership Programs (WWMP). Numeric, 2 positions; required if you don't specify a shipment interval, or display-only.
Next release date	The next date when the Generating Membership Orders (EGMO) program should consider the customer membership eligible for order generation. When you create the customer membership or generate a new order, the system calculates this date based on the Shipment interval or Fixed shipment day. *To change:* Select *Release Date*. See Changing Release Date or Rotation for a Customer Membership. The system updates the next release date if you change the Fixed shipment day. Numeric, 6 positions (in user date format); display-only.
Last order date	The last date when you generated a new order for the customer membership. Numeric, 6 positions (in user date format); display-only.
Next rot (Next rotation)	The rotation number for the next order to be generated for the customer membership. If the membership does not have differing rotations, this number will be *1*. You can change the next rotation for a membership by selecting *Release Date*. See Changing Release Date or Rotation for a Customer Membership. Numeric, 3 positions; display-only.
Discount start date	The date when any discount percentage for the membership begins applying to orders for the customer. The current date defaults if you set up a Discount duration for the membership program. *Validation:* If the customer membership includes a discount start date, it also requires a discount end date; otherwise, both fields must be blank. *Membership status:* Regardless of the discount start and end dates, the system applies a discount to orders only if the customer membership is in an active, in process or error status. You can override the discount start date only if the membership program's type allows changes. See Working with Membership Programs (WWMP). Numeric, 6 positions (in user date format); optional.

Field	Description
Discount end date	The last date when any discount percentage for the membership applies to orders for the customer. If you set up a Discount duration for the membership program, the system calculates this date when you create a customer membership by adding the number of months for the discount duration to the current date. *Validation:* If the customer membership includes a discount start date, it also requires a discount end date, it also requires a discount end date; otherwise, both fields must be blank *Membership status:* Regardless of the discount start and end dates, the system applies a discount to orders only if the customer membership is in an active, in process or error status. You can override the discount end date only if the membership program's type allows changes. See *Working with Membership Programs (WWMP)*. Numeric, 6 positions (in user date format); optional.
Disc% (Discount percentage)	The percentage discount to apply to orders for the customer as long as the status of the customer membership is active, in process or error and the current date is within the discount start and end dates, if defined. *Discount hierarchy:* If the customer has more than one eligible membership that carries a discount percentage, the highest discount percentage applies. Additionally, if an additional discount percentage, such as a customer discount or a promotional discount, applies to the order, the system applies this discount after subtracting the membership discount from the merchandise total. *Discount-only memberships:* If the membership is for discounting purposes only (that is, you will not be generating orders), the membership will never close automatically. Even after the discount end date passes, the membership will remain active, although the discount will no longer apply to new orders. You can override the discount percentage only if the membership program's type allows changes. See *Working with Membership Programs (WWMP)*. Numeric, 5 positions with a 2-place decimal; optional.

Field	Description
Pay type	The pay type to apply to orders generated for the customer membership. Pay type codes are defined in and validated against the Pay Type table. See *Working with Pay Types (WPAY)*. *Required for order generation:* A customer membership requires payment information unless it is for discounts only. If the customer membership does not have payment information when you generate orders, it will not be selected for order generation,; instead, it will appear on the *Memberships in Error Report*, produced when you generate membership orders. *Validation:* You can enter only the following payment categories for a customer membership: • prepaid • credit card Changes you make to a customer membership do not affect any orders you have already generated for the membership. *Tokenization:* If a customer membership is purchased with a credit card, the cardToken and customerToken captured on the payment in the Original/Parent order is stored with the Customer Membership (WWCM) record. When the child membership order is generated (EGMO), it stores those same tokens with the Order Payment Method. Numeric, 2 positions; optional.
Cash amount	The amount of cash to apply to the customer membership. You can enter a cash amount for a prepaid payment type only. *When you generate an order:* The system updates the cash amount available for the membership each time you generate an order against it. For example, if there is a $100.00 prepayment against the membership, and you generate an order for $20.00, the system reduces the cash amount for the membership to $80.00. *Updating the cash amount:* Your entry should represent the actual amount now available for the membership. *Example:* A customer prepays with two $50.00 checks for a total of $100.00. You generate an order for $20.00, and the system reduces the cash amount for the membership to $80.00. Subsequently, a $50.00 check from the customer is returned for insufficient funds. You need to enter a cash amount of $30.00 ($80.00 - $50.00) to update the cash amount correctly. Any cash amount you enter for a customer membership does not apply to existing orders you have already generated. See *About Entering Cash Amounts for a Customer Membership*. Numeric, 13 positions with a 2-place decimal; required if you enter a prepaid payment type.
CC Last 4	The last four digits of the credit card number. From the CC Last 4 field in the Customer Membership table. If you use credit card encryption, the system does not encrypt the value in this field. Alphanumeric, 4 positions; display-only.

Field	Description
Expiration date	The last date when the credit card number is valid. An expiration date is required if you enter a credit card pay type; otherwise, entry is prohibited. *Validation:* The system validates that the expiration date has not already passed when you select *OK* at this screen. Additionally, the system checks the expiration date as part of the authorization process when you generate a pick slip for a membership order. Numeric, 4 positions (in user date format); required for a credit card pay type.
Default source	The source code to use when generating orders for the membership. If a source code was specified for the membership program it defaults here, but you can override it. The system validates that the source code you enter is current, valid and not restricted. The source code you enter here defaults to the Original source field if you are creating the membership through the Work with Customer Memberships menu option. If this source code matches the source code in the *Default Unknown Source Code (I58)* system control value, the system updates the source code on the order header to the source code associated with the offer on the first order detail line; see *Default Unknown Source Code Logic*. Changes you make to a customer membership do not affect any orders you have already generated for the membership. Source codes are defined in and validated against the Source Code table; see *Working with Source Codes (WSRC)*. You can override the default source only if the membership program's type allows changes. See *Working with Membership Programs (WWMP)*. Alphanumeric, 9 positions; required.
Original source	The original source code associated with the customer membership. If you create the customer membership through *Working with Customer Memberships (WWCM)*, the source code assigned to the membership program defaults. If you create the customer membership through order entry, the source code from the order header defaults. This code is used for reporting and tracking purposes only. Changes you make to a customer membership do not affect any orders you have already generated for the membership. You can override the original source only if the membership program's type allows changes. See *Working with Customer Memberships (WWCM)*. Alphanumeric, 9 positions; required.

Field	Description
Ship via	The ship via to use for orders you generate for the membership program. The ship via specified for the membership program (if any) defaults here, but you can override it. *Invalid SCF/ship via combination:* If the ship via for the customer membership is not valid for the shipping address on the order, the order will appear on the Print Phone Errors listing report when you generate orders and will remain in error status (*E*) until you correct the error in batch order entry; also, the customer membership will be in-process (*I*) status. Changes you make to a customer membership do not affect any orders you have already generated for the membership. You can override the ship via only if the membership program's type allows changes. See *Working with Customer Memberships (WWCM)*. Ship via codes are defined in and validated against the Ship Via table. See Working with Ship Via Codes (WVIA). *Auto-selection of best way ship via:* If the ship via for the customer membership matches the Best Way Ship Via for Auto-Assignment (J67), the system automatically selects the “best way” ship via with the lowest overall shipping costs when you generate a membership order. However, in this situation, the Order Total Window (Reviewing the First Order Total) displayed in order entry or in *Working with Customer Memberships (WWCM)* does not include any shipping charges. See the *Best Way Ship Via for Auto-Assignment (J67)* system control value for a discussion on auto-assignment. **Note:** You cannot create a standard customer membership at this screen if the membership type does not allow changes and there is no default ship via specified for the membership program, because the ship via code is a required field. See *Working with Customer Memberships (WWCM)* for more information on setting up membership programs. Numeric, 2 positions; required.

Field	Description
Ship complete	Controls whether all items on each order you generate for the customer membership must ship together. Valid values are: • *selected* = Order must ship complete; available items will be held until each item is available and the entire order can ship together. • *unselected* = Items can be shipped as they become available, or backordered and shipped at a later date. The setting from the membership program defaults, but you can override it. Changes you make to a customer membership do not affect any orders you have already generated for the membership. You can override the ship complete flag only if the membership program's type allows changes. See *Working with Customer Memberships (WWCM)*.
Recip (Recipient)	The customer sold-to number identifying the recipient for the customer membership. You can select the *Customer#* box to advance to the Select Customer Sold To pop-up window; this window permits scanning on various types of information, such as postal code, name, telephone number and email address. If you do not select a customer through this window, you advance to the *Customer Membership Recipient Screen (Change Mode)*. Changes you make to a customer membership do not affect any orders you have already generated for the membership. Customer sold-to numbers are defined in and validated against the Customer Sold To table. See *Creating and Updating Sold-to Customers (WCST)*. Numeric, 9 positions; optional.
Ship to #	A number to identify a permanent ship-to customer associated with the Recipient customer for the membership. See *Creating and Updating Ship-to Customers (WCST)*. The system validates your entry against the ship-to customers associated with the membership recipient. To select a ship-to customer associated with the customer who ordered the membership, you should enter that same customer sold-to number in the Recipient field. Changes you make to a customer membership do not affect any orders you have already generated for the membership. Numeric, 3 positions; optional.
Recipient name	The name of the recipient of the customer membership, or the recipient's ship-to, if selected; this is the customer who will actually receive the order(s) for the membership. Alphanumeric, 41 positions; display-only.

Field	Description
Gift	Indicates whether the order is flagged as a gift. Valid values are: • *Selected* = This customer membership generates gift orders. • *Unselected* = This customer membership does not generate gift orders. Flagging an order as a gift can control: • how pick slips sort and break into documents • whether prices print on pick slips • printing of gift acknowledgments See *Performing Pick Slip Generation*. Changes you make to a customer membership do not affect any orders you have already generated for the membership. The *Default "Gift Order" Flag (D14)* system control value does not affect the default setting for this field.
Shipments	The total number of orders generated for this customer membership. If a generated order fails the edit and is in error status, this total is not updated until you correct the error(s) and reprocess the order batch. Numeric, 3 positions; display-only.
Shipment $	The total dollar value of all orders generated for the membership, including merchandise, tax, and all related charges. If a generated order fails the edit and is in error status, this total is not updated until you correct the error(s) and reprocess the order batch. Numeric, 20 positions with a 2-place decimal; display-only.
Gift message	A message to print on the pick slip for gift orders you generate for the membership. This message prints only if your unique printing program supports it. Changes you make to a customer membership do not affect any orders you have already generated for the membership. The message will print on the pick slip for the next order you generate; once the message prints, the system deletes the message from the customer membership. Alphanumeric, three 60-position fields; optional.

Screen Option	Procedure
Create a customer membership recipient	Select *Recipient* to advance to the *Customer Membership Recipient Screen (Change Mode)*.
Work with an alternate shipping address for the customer membership	Select *Alt Ship* to advance to the *Alternate Shipping Address Screen (Change Mode)*. You would use an alternate address if the customer wants the membership orders sent to a different address, such as a vacation home, for a limited period of time.
Create a new customer as a recipient for the membership, or work with an existing membership recipient	Select *Alt Ship* to advance to the *Customer Membership Recipient Screen (Change Mode)*. A recipient customer has a separate customer sold-to record in your company.
Work with items for the customer membership	Select *Details* to advance to the *Customer Membership Details Screen*.

Screen Option	Procedure
Delete the customer membership	Select *Delete*. You can delete a customer membership only if you have not already generated any orders; otherwise, you must cancel the membership. See *Deleting a Customer Membership*.
Change the next release date for the membership	Select *Release Date* to display the Override Release Date pop-up window. See *Changing Release Date or Rotation for a Customer Membership*.

About Entering Cash Amounts for a Customer Membership

Overview: You can enter cash amounts for standard customer memberships in order to use the cash as a payment method on generated customer orders.

Update to cash amount: When you generate an order for the customer membership, the system reduces the total cash amount to reflect the amount allocated to the new order. For example, if the total cash amount is $100.00, and you generate an order for $20.00, the system reduces the cash amount for the customer membership to $80.00.

You can update the cash amount after you have begun to generate orders for the customer membership; however, your reset to the cash amount total should reflect the total amount that has already been allocated to generated orders. Your entry should be equal to the new total cash amount available for the customer membership.

Example: A customer prepays with two $50.00 checks for a total of $100.00. You generate an order for $20.00, and the system reduces the cash amount for the membership to $80.00. Subsequently, a $50.00 check from the customer is returned for insufficient funds. You need to enter a cash amount of $30.00 ($80.00 - $50.00) to update the cash amount correctly.

When the cash amount is exhausted: The system will continue to generate orders for the membership; however, these orders will be put on hold because of the balance due. You must use order maintenance to apply cash to these orders and change their status to open.

About existing orders: Any cash amount you enter does not apply to existing orders that have been generated for the membership. You must use order maintenance to enter payment information for these orders.

Canceling a prepaid membership: The system does not generate a refund for the remaining cash amount for the membership. You will need to create and generate the refund separately.

Refund when membership closes: When you generate the last order for a prepaid membership, the system creates a refund for any remaining prepayment amount. The system closes a membership when all items have been included on generated orders the number of times specified in the Number of times to include field.

Customer Membership Details Screen

Purpose: Use this screen to enter or review items to include on a standard customer membership. This option is not available for loyalty customer memberships.

How to display this screen: Select *Details* at the *Customer Membership Screen (Change Mode)*, or select *Details* for a standard customer membership at the *Work with Customer Memberships Screen*.

> **Note:**
>
> You can change information on this screen only if the membership program's type allows changes; otherwise, each field is display-only. See *Working with Membership Programs (WWMP)* Additionally, if you advanced to this screen from the Customer Membership Screen in Display mode, each field on this screen is display-only and cannot be changed.

Field	Description
Membership header information	
Customer #	The number that identifies the customer who ordered the customer membership. The customer's name appears to the right. Number: numeric, 9 positions; display-only. Name: alphanumeric, 41 positions; display-only.
Membership ID	The code representing the membership program. The description of the program appears to the right. ID: alphanumeric, 12 positions; display-only. Description: alphanumeric, 30 positions; display-only.
Type	A code that identifies the type of membership program. Alphanumeric, 2 positions; display-only.
Last order date	The last date when an order was generated for the customer membership. Numeric, 6 positions (in user date format); display-only.
Next release date	The next date when the *Generating Membership Orders (EGMO)* program should consider the customer membership eligible for order generation. Numeric, 6 positions (in user date format); display-only.
Next rot (Next rotation)	The next rotation due to be included when you generate membership orders. You assign a rotation to an item on a customer membership to indicate when it should be included in an order. A rotation of *1* indicates that the item should be included on the first order you generate. A rotation of *2* indicates that the item should be included on every other order, and so on. A rotation of *0* indicates that the item should be included on every order. If the membership does not have differing rotations (that is, each order includes the same item(s), the next rotation will always be *1*. Numeric, 3 positions; display-only.
Membership detail information	

Field	Description
Item	An item to include on membership orders you generate. Items that are currently included in the membership, including items that defaulted from the membership program, appear below. If you have not already generated an order that includes the item, you can change the item code itself by selecting *Change* for the item to advance to the *Customer Membership Detail Screen (Change Mode)*. You cannot delete an item from a customer membership. To cancel an item, select *Cancel* for the item; see *Canceling an Item on a Customer Membership*. Item codes are defined in and validated against the Item table. See *Performing Initial Item Entry (MITM)*. Alphanumeric, 12 positions; optional.
SKU	The item's additional characteristics, such as its color and size. If you have not already generated an order that includes the item, you can change the SKU by selecting *Change* for the item to advance to the *Customer Membership Detail Screen (Change Mode)*. Alphanumeric, three 4-position fields; required if the item has SKUs.
Qty ord (Quantity ordered)	The quantity of the item to include in an order you generate for the membership. *Entering a new item:* This field is required if you are entering a new item for the customer membership. *Default from membership program:* The quantity defaults from the membership program if the item itself defaulted; however, you can override the quantity by selecting *Change* for the item to advance to the *Customer Membership Detail Screen (Change Mode)*. Numeric, 5 positions; required.
Rot (Rotation)	The rotation in which to include the item when you generate orders. Items with a rotation of *1* will be included in the first order you generate, while items with a rotation of *2* will be included in the second order, and so on. Items with a rotation of *0* will be included in each order you generate. After creating a number of orders that is a multiple of the highest rotation assigned to an item, the cycle repeats. *For example:* A membership includes these items and rotations: AB100: rotation = *0* CD200: rotation = *1* EF300: rotation = *2* The items will be included in the following pattern: First order: AB100, CD200 Second order: AB100, EF300 Third order: AB100, CD200 (cycle repeats) *Entering an item:* This field defaults to *1*, but you can override it. Set the rotation to *0* to include the item in every order you generate. *Default from membership program:* The rotation defaults from the membership program if the item itself defaulted; however, you can override the rotation by selecting *Change* for the item to advance to the *Customer Membership Detail Screen (Change Mode)*. Numeric, 3 positions; required.

Field	Description
Tms inc (Number of times to include)	The total number of times to include the item on an order. If this field is blank or *0*, there is no limit to the number of times to include the item. *Entering an item:* Leave this field blank to include the item indefinitely. *Default from membership program:* The number of times to include defaults from the membership program if the item itself defaulted; however, you can override the number of times to include by selecting *Change* for the item to advance to the *Customer Membership Detail Screen (Change Mode)*. Numeric, 3 positions; optional.
N/C (No charge)	Indicates whether the item is to be included free of charge. Valid values are: • *Selected* = The item is included free of charge • *Unselected* = The item has a price *Entering an item:* Leave this field blank if the item should have a price. Otherwise, *select* this field; you will also need to specify a price override reason code, below. *Default from membership program:* If an item was flagged as “no charge” for the membership program, it defaults here; however, you can override this flag by selecting *Change* for the item to advance to the *Customer Membership Detail Screen (Change Mode)*.
Override price	The price to charge for the item on orders you generate for customer memberships. You would specify a price override if you do not want the system to use the regular pricing hierarchy for membership orders. *Entering an item:* Leave this field blank to have the system use its normal pricing hierarchy to determine the price of the item when you generate orders. Otherwise, enter an override price; you will also need to specify a price override reason code. *Default from membership program:* The price override, if any, defaults from the membership program if the item itself defaulted; however, you can change or delete the price override by selecting *Change* for the item to advance to the *Customer Membership Detail Screen (Change Mode)*. Numeric, 13 positions with a 2-place decimal; optional.
Ovr rsn (Price override reason code)	The price override reason code for the system to use when adding the item to the order at no charge, or with an override price. *Entering an item:* Enter a price override reason code if you have flagged the item as "no charge" or entered an override price. *Default from membership program:* The price override reason code, if any, defaults from the membership program if the item itself defaulted; however, you can change this information by selecting *Change* for the item to advance to the *Customer Membership Detail Screen (Change Mode)*. Price override reason codes are defined in and validated against the Price Override Reason Code table. See *Establishing Price Override Reason Codes (WPOR)*. Alphanumeric, 1 position; required if the item is flagged as "no charge" or if you enter a price override.

Field	Description
Sts	The status of the item on the customer membership. Valid values are: • *X* = Closed. The item has been included on orders as many times as the number of times to include. • *C* = Canceled. The item or the entire membership have been canceled. • *A* = Active. The item is eligible to be included in future orders. Alphanumeric, 1 position; display-only.
Tms shp (Times shipped)	The total number of times the item has been included on an order you have generated for the membership. The system updates this number when you generate orders. If the order is in error when you first generate, the system does not update this number until you correct the error(s) and reprocess the order batch. Numeric, 3 positions; display-only.
Qty shp (Quantity shipped)	The total number of units of the item that has been included on orders you have generated for the membership. The system updates this number when you generate orders. If the order is in error when you first generate, the system does not update this number until you correct the error(s) and reprocess the order batch. Numeric, 5 positions; display-only.
Description	The description of the item (*not* the SKU, even if the item has SKUs). Alphanumeric, 120 positions; display-only.
Avail (Quantity available)	This is the quantity of this item that is available to sell across all shippable warehouses. A negative quantity indicates that the SKU is unavailable in your inventory and is backordered. The system displays this information only if the status of the item on the membership is active. Numeric, 7 positions; display-only, updated by the system.
Exp (Expected date)	The next date when a delivery of this SKU is expected, based on an open purchase order. No date displays if there are no open purchase orders for this SKU. This date is displayed for drop ship items only if the *Assign Drop Ship Expected Ship Date (I59)* system control value is *selected*. See that system control value for more information. The system displays this information only if the status of the item on the membership is active. Numeric, 6 positions (in user date format); display-only.

Adding an item to a customer membership:

1. Complete the Item and Quantity ordered fields and any optional fields.
2. The system validates your entry and highlights any fields you need to correct. Correct any fields and select *OK* again.
3. The system clears your entries from the enterable fields, and displays the item you have added at the *end* of the listing of items for the customer membership.

Screen Option	Procedure
Change an item on the customer membership	Select *Change* for an item to advance to the *Customer Membership Detail Screen (Change Mode)*.
Cancel an item on the customer membership	Select *Cancel* for an item to cancel it. See *Canceling an Item on a Customer Membership*.
Display an item on the customer membership	Select *Display* for an item to advance to the Customer Membership Detail screen (Display mode0. You cannot change any information in this mode. See *Customer Membership Detail Screen (Change Mode)* for field descriptions.
Review current pricing for an item	Select *Pricing* for an item to advance to the Display Quantity Pricing pop-up window. See *Working with Items on the Order*.
Review open purchase orders for an item	Select *Open POs* for an item to advance to the Display Open Purchase Orders Screen. See *Working with Items on the Order*.
Work with header information for the customer membership	Select *Header* to advance to the *Customer Membership Screen (Change Mode)*.
Review the dollar total for the next order to be generated	Select *Next order total* to display the *Order Total Pop-Up Window (Reviewing the Next Order Total)*.

Customer Membership Detail Screen (Change Mode)

Purpose: Use this screen to change an item on a standard customer membership.

> **Note:**
>
> You can change an item on a membership only if the membership program's type allows changes, the membership is Active (*A*), and the item's status is also Active (*A*). See *Customer Membership Details Screen*.

How to display this screen: Select *Change* for an active item at the *Customer Membership Details Screen*.

Field	Description
Customer#	A unique number to represent the sold-to customer who ordered the membership. Numeric, 9 positions; display-only.
Membership ID	A code that identifies the membership program in which the customer is enrolled. Alphanumeric, 12 positions; display-only.

Field	Description
Status	The status of the item on the customer membership. Valid values are: • *Closed* = The item has been included on orders as many times as the number of times specified. • *Cancelled* = The item or the entire membership have been canceled. • *Active* = The item is eligible to be included in future orders. Display-only.
Item	The item on the customer membership. If you have not already generated an order that includes the item, you can change the item code itself; otherwise, the item field is display-only. Item codes are defined in and validated against the Item table. See *Performing Initial Item Entry (MITM)*. Alphanumeric, 12 positions; required or display-only.
SKU	The item's additional characteristics, such as its color and size. If you have not already generated an order that includes the item, you can change the SKU; otherwise, the SKU field is display-only. See *Canceling an Item on a Customer Membership*. Alphanumeric, three 4-position fields; required if the item has SKUs or display-only.
Order quantity	The quantity of the item to include in an order you generate for the membership. Numeric, 5 positions; required.
Rotation	The rotation in which to include the item when you generate orders. Items with a rotation of *1* will be included in the first order you generate, while items with a rotation of *2* will be included in the second order, and so on. A rotation of *0* indicates that the item will be included in every order. If all items on the membership are assigned a rotation of *1* (the default), they will all be included on every order. Numeric, 3 positions; required.
# of times to include	The total number of times to include the item on orders you generate for the membership. Once the item has been included in this number of orders, the system changes its status to closed (*X*). If you do not define a number of times to include, the item will be included in generated orders until you cancel the item, or the membership itself is closed. If a number of times to include was defined for the item on the membership program, it defaults for the customer membership. You can change this number at the *Customer Membership Detail Screen (Change Mode)*. Numeric, 3 positions; display-only.
No charge	Indicates whether the item is to be included free of charge. Valid values are: • *No Charge* = The item is included free of charge • *Priced* = The item has a price If an item is to be included at no charge, you must also specify a price override reason code.

Field	Description
Price override code	The price override reason code for the system to use when adding the item to the order at no charge, or with an override price. Enter a price override reason code if you have flagged the item as "no charge" or entered an override price. Price override reason codes are defined in and validated against the Price Override Reason Code table. See *Establishing Price Override Reason Codes (WPOR)*. Alphanumeric, 1 position; required if the item is flagged as "no charge" or if you enter a price override.
Price override	The price to charge for the item on orders you generate for customer memberships. You would specify a price override if you do not want the system to use the regular pricing hierarchy for membership orders. Leave this field blank to have the system use its normal pricing hierarchy to determine the price of the item when you generate orders. Numeric, 13 positions with a 2-place decimal; optional.
# of shipments	The number of times the item has been included on orders generated to date for the customer membership. Numeric, 3 positions; display-only.
Date of last shipment	The last date when an order that included the item was generated for the membership. Numeric, 6 positions (in user date format); display-only.
Quantity shipped	The total number of units of the item that has been included on orders you have generated for the membership. Numeric, 5 positions; display-only.

Note:

Changes you make to an item on a membership do not affect any open, unshipped orders you have already generated for the membership.

Canceling an Item on a Customer Membership

Purpose: When you cancel an item from a standard customer membership, the item will not be included in any more orders that you generate for the membership, and the item's status on the membership changes to *Canceled* (*C*).

Note:

If there are any open, unshipped orders that were generated for the customer membership that include the item, the status of the item on the open order(s) remains open. You must use order maintenance to cancel the item and prevent it from shipping to the customer.

How to cancel: Select *Cancel* for an item at the *Customer Membership Details Screen* to exclude the item from orders you will generate for the membership in the future. The system displays the Confirm Cancel Request pop-up window.

Enter cancel reason: If you select *OK* at the Confirm Cancel Request pop-up window, the Enter Cancel Reason window opens. This window indicates the item you are canceling from the membership and requires a cancel reason code. The cancel reason code is a 2-position, numeric code, defined in and validated against the Cancel Reason Code table; see *Establishing Cancel Reason Codes (WCNR)*.

The system stores the cancel reason code for the item in the Customer Membership Detail table.

Canceling an item on a membership does not affect any open, unshipped orders you have already generated for the membership.

Last item? If you cancel the last remaining item on a customer membership, the membership's status changes to *Complete*. In this situation, the system does not send the membership cancellation email.

Order Total Pop-Up Window (Reviewing the Next Order Total)

Purpose: Use this window to review the projected dollar total for the next order due to be generated for a standard customer membership.

How to display this screen: Select *Display next order total* at the *Customer Membership Details Screen*.

About this window: This window indicates the next rotation eligible for order generation.

Order total an estimate: The order total that appears in this window includes merchandise and tax. It also includes projected freight charges if the ship via on the order does not match the *Best Way Ship Via for Auto-Assignment (J67)*. This order total is an estimate only. The actual order total when you generate the first order may vary, depending on changes to pricing, using various freight methods, including special charges, and so on.

Loyalty Customer Membership Screen

Purpose: Use this screen to review or change the information on a customer loyalty membership. The system creates customer loyalty memberships automatically based on the customer's order history, sales history, or customer class. See *Loyalty Memberships* for an overview.

How to display this screen: Select *Change* or *Display* for a customer loyalty membership.

> **Note:**
>
> Regardless of whether you select *Change* or *Display* for the membership, you cannot change any information at this screen if the *Change customer membership* flag for the membership type is *unselected*.

Field	Description
Customer #	A unique number to identify the customer who qualified for the loyalty membership. The customer's name or company name is displayed to the right. Number: numeric, 9 positions; display-only. Name: alphanumeric, 41 positions; display-only.
Membership ID	A code that identifies the loyalty membership program in which the customer is enrolled. The description displays to the right. ID: alphanumeric, 12 positions; display-only. Description: alphanumeric, 30 positions; display-only.
Type	A code that identifies the type of membership program. See *Working with Membership Types (WWMT)* for more information. Alphanumeric, 2 positions; display-only.
Status	The current status of the loyalty membership. Possible statuses are: • *Active* = The customer loyalty membership is active; the system will apply the discount, free freight, or backorder priority on new orders if the Discount end date has not been reached. • *Inactive* = The customer loyalty membership has been deactivated, but you can reactivate it. The system does not apply the discount, free freight, or backorder priority on new orders. • *Canceled* = The customer loyalty membership has been canceled. You can cancel a customer membership by selecting *Cancel* at the *Work with Customer Memberships Screen*. Display-only.
Created on	The date when the system created the customer loyalty membership. The background jobs create customer loyalty memberships based on order activity that affects the customer's order history, external sales dollars, or customer class. Numeric, 6 positions (in user date format); display-only.
Changed on	The most recent date when the customer loyalty membership was updated. Numeric, 6 positions (in user date format); display-only.
Cancel reason	The cancel reason you used when canceling the customer loyalty membership. The description is to the right. Displayed only for loyalty memberships in *Canceled* status. Reason: numeric, 2 positions; display-only. Description: alphanumeric, 30 positions; display-only.
Cancelled on	The date when the customer loyalty membership was canceled. Displayed only for loyalty memberships in *Canceled* status. Numeric, 6 positions (in user date format); display-only.
Discount start date	The date when the loyalty discount and other options (free freight, backorder priority) become effective. The same as the Created on date. Numeric, 6 positions (in user date format); display-only unless the *Change customer membership* flag for the loyalty membership type is selected.

Field	Description
Discount end date	The last date to apply the loyalty discounts and other options (free freight, backorder priority). Calculated by the system when it creates the customer loyalty membership, based on the Discount duration specified for the loyalty program. See *Working with Membership Programs (WWMP)* for more information. Numeric, 6 positions (in user date format); display-only unless the *Change customer membership* flag for the loyalty membership type is selected.
Discount %	The discount percentage that defaults to the customer's orders based on membership in the loyalty program. The percentage defaults from the Discount percent specified for the loyalty program. See *Working with Membership Programs (WWMP)* for more information. Numeric, 5 positions with a two-place decimal; display-only unless the *Change customer membership* flag for the loyalty membership type is selected.
Free freight	Selecting this field indicates that free freight defaults on the customer's orders. This setting defaults from the Free freight setting for the loyalty program. See *Working with Membership Programs (WWMP)* for more information. Display-only unless the *Change customer membership* flag for the loyalty membership type is *selected*.
Priority B/O	Indicates the backorder priority, if any, that defaults to the customer's orders. *9* indicates the highest priority, while *0* is the lowest priority. This setting defaults from the Priority B/O field for the loyalty program. See *Working with Membership Programs (WWMP)* for more information. Numeric, 1 position; display-only unless the *Change customer membership* flag for the loyalty membership type is *selected*.

Changing Customer Membership Status, Rotation or Release Date

Canceling a Customer Membership

Select *Cancel* for a membership at the *Work with Customer Memberships Screen* to display the Confirm Cancel Request pop-up window. If you select *OK* at this window, the system displays the Enter Cancel Reason pop-up window, where you must enter a cancel reason.

Cancel reason code: This window requires a cancel reason code. The cancel reason code is a 2-position, numeric code, defined in and validated against the Cancel Reason Code table; see *Establishing Cancel Reason Codes (WCNR)*.

The system stores the cancel reason code for the item in the Customer Membership table.

You can cancel a membership only if its status is Active (*A*) or Inactive (*I*).

Cautions: Canceling a membership does *not*:

- affect any open, unshipped orders you have already generated for the membership.
- delete the membership; it remains on the system. See *Deleting a Customer Membership* on how to remove a membership you created in error.

- delete the membership item from the quote or order where it originated.
- generate a refund for the remaining cash amount for a prepaid membership. You will need to create and generate the refund separately.

> **Note:**
>
> Canceling a loyalty membership does not prevent the background jobs from creating a new loyalty membership for the customer the next time there is order activity.

Email notification: If the *Membership Cancellation Email Program (K77)* system control value specifies a valid program name, the system generates the membership cancellation email or *Outbound Email XML Message (CWEmailOut)* when you cancel a membership as described above. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). And see *Membership Cancellations* for a discussion.

Canceling through order maintenance: You can also cancel a standard customer membership in order maintenance by canceling the order or membership item that created the customer membership. See *Canceling a Membership Item*.

Canceling a membership in order maintenance does not generate the email notification.

You cannot cancel a loyalty membership in order maintenance, since loyalty memberships are created by the system and not by adding a membership item to an order.

Deactivating a Customer Membership

Select *Deactivate* for a membership at the *Work with Customer Memberships Screen* to change the membership's status from Active (*A*) to Inactive (*I*). The system will not generate any new orders for an inactive membership, and any discount will not apply to any orders the customer places.

You can deactivate a membership only if its current status is *Active*.

> **Note:**
>
> The system does not send a deactivation notification email to the customer if you deactivate a loyalty membership using this method. See *Loyalty Memberships* for more information.

Activating a Customer Membership

Select *Activate* for a membership at the *Work with Customer Memberships Screen* to change the membership's status from Inactive (*I*) to Active (*A*).

The system displays the Override Release Date pop-up window.

You can activate a membership only if its current status is *Inactive*.

Changing Release Date or Rotation for a Customer Membership

Select *Change release date/rotation* for a standard customer membership at the *Work with Customer Memberships Screen* to display the Override Release Date pop-up window.

Release date: Enter the next date when the order should be eligible for release. The next release date must be later than the current date and the Last order date.

Note:

- *Eligible for release date change?* You can change the release date only for a standard customer membership that includes items that are scheduled for shipment on the next rotation. You can review the items on the customer membership by selecting *Details*.
- *No automatic customer notification:* If you change the release date, there is no mechanism to automatically notify the customer of the new date or change the order message that was written as a result of the *Write Order Messages for Membership Rotation (K04)* system control value.

Rotation: Enter the next rotation to use when you generate an order for the membership. The current setting to the Next rotation field defaults. The system will select items based on the rotation you enter. You cannot enter a rotation number if there are no items for the membership assigned to that rotation.

You can display this window only if the membership is currently in Active (*A*) or Inactive (*I*) status. This option is not available for loyalty customer memberships.

> **Note:**
>
> You can also display this window by selecting *Release Date* at the *Customer Membership Screen (Change Mode)*.

Summary of Status Change Options for Customer Memberships

The options available for changing a membership's status or release date at the *Work with Customer Memberships Screen* are:

If current status is...	Then you can...				
	Cancel	Activate	Deactivate	Change Release Date	Change Rotation
				Note: Standard customer memberships only. Not available for loyalty membersh	

If current status is...	Then you can...				
	Cancel	Activate	Deactivate	Change Release Date	Change Rotation
				ip s	
Active	Yes	No	Yes	Yes	Yes
Inactive	Yes	Yes	No	Yes	Yes
Canceled	No	No	No	No	No
Completea	No	No	No	No	No
In Processa	No	No	No	No	No

Display Membership Orders Screen

Purpose: Use this screen to review the orders that have been generated for a standard customer membership and to select an order for inquiry. Only orders that have been generated through the selected customer membership appear on this screen.

How to display this screen: Select *Orders for customers* for a membership at the *Work with Customer Memberships Screen*.

> **Note:**
>
> This option is not available for loyalty customer memberships.

Field	Description
Customer #	A unique number to represent the sold-to customer who ordered the membership. The name of the customer appears to the right. Number: numeric, 9 positions; display-only. Name: alphanumeric 41 positions; display-only.
Membership ID	A code that identifies the membership program in which the customer is enrolled. Alphanumeric, 12 positions; optional.
Sequence number (Unlabeled field to the right of the membership ID)	A unique number to identify the membership program for this customer. The sequence number is separated from the membership ID by a hyphen (-). If there is only one customer membership for the same customer and membership program, the sequence number will be *1*. Numeric, 3 positions; display-only.
Date	The date the order was generated. Numeric, 6 positions (in user date format); optional.
Order# (Order number)	A unique number to identify the order. Numeric, 8 positions; optional.

Field	Description
Sts (Status)	The status of the order. Valid values are: • *Open* = one or more items have not yet been shipped. • *Archived* • *Backordered* • *Drop Ship* • *Held* = the order will not be eligible for shipment until you resolve the hold reason, which may be due to credit check or fraud. • *Suspended* = the order is in an unprocessed order batch. • *Error* = the order did not pass the phone order edit; you must correct all errors and resubmit the order batch to the edit process. • *Canceled* = all items have been canceled. • *Closed* = each item has been shipped. • *Sold Out* • *Purged* Optional.
Rcp (Recipient)	The number of recipients for the order. Normally, this number will be *1* unless you added a recipient in order maintenance. Numeric, 3 positions; display-only.
Order total	The total dollar value of the order. Numeric, 20 positions with a 2-place decimal; display-only.
Ent (Entity)	A code representing the entity associated with the source code on the order header. See Working with Entities (WENT). Numeric, 3 positions; display-only.
Activity	Codes that indicate whether any of the items on the order have been returned, exchanged, or backordered. Each of these valid values may appear: • *RT* = There has been one or more returns against the order • *EX* = There has been one or more exchange against the order • *BO* = One or more of the items on the order is currently backordered. Alphanumeric, three 2-position fields; display-only.
R/E date (Return/ exchange date)	The date when you last received a returned item against the order. Numeric, 6 positions (in user date format); display-only.

Screen Option	Procedure
Select an order for inquiry	*Select* an order. You advance to either the standard order inquiry header or detail screen, depending on the setting of the Default Version for Order Inquiry (C34) system control value.

Deleting a Customer Membership

Purpose: To delete a standard customer membership, you must advance to the *Customer Membership Screen (Change Mode)* and select *Delete*.

You can delete a standard customer membership only if its status is *Active* or *Inactive*, and you have not generated any orders for the membership. If you have already generated one or more orders, you will need to cancel the membership; see *Canceling a Customer Membership*.

To delete: Select *Delete* to delete the customer membership. The system displays the Confirm Delete pop-up window.

Prepaid memberships: If you have entered a cash prepayment amount, the system does not generate a refund when you delete the membership; you must do so separately.

> **Note:**
>
> This option is not available for loyalty customer memberships.

Alternate Shipping Address Screen (Change Mode)

Purpose: Use this screen to define an alternate shipping address to use for orders you generate for the standard customer membership. For example, you would use this screen to enter a vacation or summer address.

> **Note:**
>
> Your entries on this screen do not update any open, unshipped orders you have already generated for the membership.

How to display this screen: Select *Alt Ship* at the *Customer Membership Screen (Change Mode)*.

> **Note:**
>
> This option is not available for loyalty customer memberships.

When you select *Alt Ship* at the Customer Membership Screen in Display mode, the Alternate Shipping Address screen is also in Display mode. You cannot change any information in this mode.

Field	Description
Customer#	A unique number to represent the sold-to customer who ordered the membership. Numeric, 9 positions; display-only.

Field	Description
Customer name (Unlabeled field to the right of the customer number	The name of the customer who ordered the membership. Alphanumeric, 41 positions; display-only.
Order#	The order on which the customer ordered the customer membership. This field does not appear if you created the customer membership through *Working with Customer Memberships (WWCM)* Numeric, 8 positions; display-only.
Membership ID	A code that identifies the membership program in which the customer is enrolled. Alphanumeric, 12 positions; display-only.
Description (Unlabeled field to the right of the membership ID)	The description of the membership program. Alphanumeric, 30 positions; display-only.
Type	A code that identifies the type of membership program. You can use membership types to group membership programs, to control whether any of the settings for the membership program can be overridden for specific customer memberships, or to identify loyalty membership programs. Alphanumeric, 2 positions; display-only.
Name	The following 5 fields are available for you to enter the customer's full name: *Prefix* A title (such as "Mrs." or "Dr.") that precedes the customer's name. Alphanumeric, 3 positions; optional. *First Name* The customer's first name Alphanumeric, 15 positions; optional. *Initial* The initial of the customer's middle name. Alphanumeric, 1 position; optional. *Last Name* The customer's last name. Alphanumeric, 25 positions; required if company name is not present. *Suffix* An addition to the customer's full name (such as "M.D.," "Fr.," or "III"). The suffix will print on labels, reports, etc., but is not accessible to scans. Alphanumeric, 3 positions, optional.
Company	The name of the company. Alphanumeric, 30 positions; required if last name is not present.
Address	The customer's street address. This is the primary delivery address. Alphanumeric, 32 positions; required.

Field	Description
Apt./suite (Apartment/suite)	The apartment number or suite number associated with the customer's delivery address. Follow these steps to enter an apartment or suite address: 1. Enter *APT* to indicate an apartment or *STE* to indicate a suite. 2. Insert a space and enter the number of the apartment or suite, for example: *APT 4* or *STE 116*. Addresses must conform to United States Parcel Service (USPS) address formatting field description standards. For example, always precede the apartment or suite number with the appropriate abbreviation (for example, APT or STE). Alphanumeric, 10 positions; optional.
Additional address (Unlabeled fields below the street address)	Three additional lines of the customer's delivery address. If the address represents a post office box, you must enter *P.O. Box* on the first line to meet USPS delivery regulations. Alphanumeric, three 30-position lines; optional.
Postal code	The postal or zip code for this customer. This code represents a delivery area. Required only if the Require postal code? flag is selected for the country; see *Setting Up the Country Table (WCTY)*. If a postal code is required, it is validated against the Zip/City/State (Postal Code) table; see *Setting Up the Zip/City/State (Postal Code) Table (WZIP)*. **Note:** The system fills in the City and State fields appropriately if you set up the Postal Code/City/State table and you enter a valid postal code. Alphanumeric, 10 positions; required or optional based on country.
City	The city where the customer lives or receives mail or shipments. Alphanumeric, 25 positions; required.
State	The state or province where the customer lives or receives mail or shipments. State codes are defined in and validated against the State table, accessible through the Work with Countries menu option; see Setting Up the Country Table (WCTY). Required only if the Require state? flag is selected for the country. The system validates that the state you enter is assigned to the SCF for the postal code. Alphanumeric, 2 positions; required or optional based on country.
Country	The code for the customer's country. Country codes are defined in and validated against the Country table. See *Setting Up the Country Table (WCTY)*. Alphanumeric, 3 positions; required.

Field	Description
Delivery	Identifies a business (commercial) or residential address, and is used to calculate shipping charges for shippers that use rate tables (such as U.P.S.). The value in the *Default Delivery Code for New Order Entry Customers (D13)* system control value defaults here; however, you can override this default. If you clear this field and select *OK*, the system assigns the default delivery code to the shipping address. • *Business* = Business rate table determines shipping charges. • *Residential* = Residential rate table determines shipping charges. • *No Distinction* = No distinction between business and residence. Only *Business* and *Residential* are valid values for U.P.S. The system defines the shipper on an order as U.P.S. if the Type field in the Ship Via table = U; see *Working with Ship Via Codes (WVIA)*. Required.
Start date	The first date when orders should be shipped to the alternate address. You can leave both the Start date and Stop date blank to use the alternate address indefinitely. You can also enter a Start date and leave the Stop date blank; the system displays a message requiring you to select *OK* to confirm. You cannot complete both this field and the Start with shipment field. Numeric, 6 positions (in user date format); required if you enter a stop date.
Stop date	The last date when orders should be shipped to the alternate address. You can leave both the Start date and Stop date blank to use the alternate address indefinitely; however, the Start date or the Start with shipment field is required if you enter a Stop date. You can also enter a Start date and leave the Stop date blank; the system displays a message requiring you to select *OK* to confirm. Numeric, 6 positions (in user date format); optional.
Start with shipment	Indicates the first shipment to use the alternate shipping address. For example, if you enter *5* in this field, the fifth order and subsequent orders for the membership will be shipped to the alternate address. You cannot complete both the Start date and this field. Numeric, 3 positions; optional.
End with shipment	Indicates the last shipment to use the alternate shipping address. For example, if you enter *10* in this field, the system will use the alternate shipping address up to the tenth order, then stop. Numeric, 3 positions; optional.

Note:

You must advance to this screen from the *Customer Membership Screen (Change Mode)*, not Display mode, to enter or change an alternate address.

Your entries on this screen do not update any orders you have already created for the membership.

Screen Option	Procedure
Delete the alternate shipping address	Select *Delete*. **Note:** Deleting the alternate address from the membership will not update any open, unshipped orders for the membership.

Customer Membership Recipient Screen (Change Mode)

Purpose: Use this screen to enter information on a customer who will receive shipments on orders you generate for a standard customer membership.

Unlike the alternate shipping address, the recipient customer refers to a separate customer in the Customer Sold To table.

Note:

This option is not available for loyalty customer memberships.

Change or Create Options for a Membership Recipient

If a recipient customer is not already assigned:

- *Select a customer to assign to the membership: Click* on the arrow in the first enterable field on the screen to advance to the Select Customer Sold To pop-up window. You can use this window to select an existing sold-to customer, who will be assigned to any future orders you generate for the membership. Existing open, unshipped orders for the membership will not be updated. However, if you make any changes to the customer's name and address information at the time you are assigning the customer to the membership, both the customer's record in the Customer Sold To table and any existing orders will be updated with the new information.
- *Create a new customer to assign to the membership:* Complete the fields on this screen to create a new customer sold-to, who will be assigned to any future orders

you generate for the membership. Existing open, unshipped orders will not be updated.

If a recipient customer has already been assigned:

- *Change the assigned customer's name and address information:* Any changes you make to the customer's name and address information update both the customer's record in the Customer Sold To table and any existing orders.
- *Assign a different customer as a recipient for the membership: Click* on the arrow in the first enterable field on the screen to advance to the Select Customer Sold To pop-up window. You can use this window to select an existing sold-to customer, who will be assigned to any future orders you generate for the membership. Existing open, unshipped orders for the membership will not be updated.
- *Remove the recipient customer from the membership:* Return to the *Customer Membership Screen (Change Mode)* and *delete* the Recipient field to clear it. Any future orders you generate for the membership will not include the recipient customer; however, existing open, unshipped orders for the membership will not be updated.

How to display this screen: You can display this screen by selecting *Alt Ship* at the *Customer Membership Screen (Change Mode)*. You can also display this screen by:

- *clicking* on the arrow in the Recip field on the *Customer Membership Screen (Change Mode)*, then selecting *Exit* at the Select Customer Sold To pop-up window.
- Selecting *Recipient* at the *Customer Membership Screen (Change Mode)*.

When you select *Alt Ship* at the Customer Membership Screen in Display mode, the Customer Membership Recipient screen is also in Display mode. You cannot change any information in this mode.

Field	Description
Sold to (Sold-to customer number)	A unique number to represent the sold-to customer who ordered the membership. Numeric, 9 positions; display-only.
Customer name (Unlabeled field to the right of the customer number)	The name of the customer who ordered the membership. Alphanumeric, 41 positions; display-only.
Customer name (Unlabeled field to the right of the customer number)	The name of the customer who ordered the membership. Alphanumeric, 41 positions; display-only.
Membership ID	A code that identifies the membership program in which the customer is enrolled. Alphanumeric, 12 positions; display-only.
Description (Unlabeled field to the right of the membership ID)	The description of the membership program. Alphanumeric, 30 positions; display-only.
Type	A code that identifies the type of membership program. You can use membership types to group membership programs, or to indicate whether any of the settings for the membership program can be overridden for specific customer memberships. Alphanumeric, 2 positions; display-only.

Field	Description
Recipient#	The sold-to customer number of the recipient assigned to the customer membership. To change the recipient number, select *Exit* to return to the *Customer Membership Screen (Change Mode)*, where you can enter a different number or select *Header* to create a new sold-to customer as a recipient for the membership. This field is blank if you have not yet assigned a recipient customer to the membership. If you complete the information on this screen, the system creates a new sold-to customer and assigns that customer as the recipient for the membership. Numeric, 9 positions; display-only.
Name	The following 5 fields are available for you to enter the customer's full name: *Prefix* A title (such as "Mrs." or "Dr.") that precedes the customer's name. Alphanumeric, 3 positions; optional. *First Name* The customer's first name Alphanumeric, 15 positions; optional. *Initial* The initial of the customer's middle name. Alphanumeric, 1 position; optional. *Last Name* The customer's last name. Alphanumeric, 25 positions; required if company name is not present. *Suffix* An addition to the customer's full name (such as "M.D.," "Fr.," or "III"). The suffix will print on labels, reports, etc., but is not accessible to scans. Alphanumeric, 3 positions, optional.
Company	The name of the company. Alphanumeric, 30 positions; required if last name is not present.
Address	The customer's street address. This is the primary delivery address. Alphanumeric, 32 positions; required.
Apt./suite (Apartment/suite)	The apartment number or suite number associated with the customer's delivery address. Follow these steps to enter an apartment or suite address: 1. Enter *APT* to indicate an apartment or *STE* to indicate a suite. 2. Insert a space and enter the number of the apartment or suite, for example: *APT 4* or *STE 116.* Addresses must conform to United States Parcel Service (USPS) address formatting field description standards. For example, always precede the apartment or suite number with the appropriate abbreviation (for example, APT or STE). Alphanumeric, 10 positions; optional.
Additional address (Unlabeled fields below the street address)	Three additional lines of the customer's delivery address. If the address represents a post office box, you must enter *P.O. Box* on the first line to meet USPS delivery regulations. Alphanumeric, three 30-position lines; optional.

Field	Description
Postal code	The postal or zip code for this customer. This code represents a delivery area. If a postal code is required, it is validated against the Zip/City/State (Postal Code) table; see *Setting Up the Zip/City/State (Postal Code) Table (WZIP)*. **Note:** The system fills in the City and State fields appropriately if you set up the Postal Code/City/State table and you enter a valid postal code. Alphanumeric, 10 positions; required or optional based on country.
City	The city where the customer lives or receives mail or shipments. Alphanumeric, 25 positions; required.
State	The state or province where the customer lives or receives mail or shipments. State codes are defined in and validated against the State table, accessible through the Work with Countries menu option; see Setting Up the Country Table (WCTY). Required only if the Require state? flag is selected for the country. The system validates that the state you enter is assigned to the SCF for the postal code. Alphanumeric, 2 positions; required or optional based on country.
Country	The code for the customer's country. The value in the *Default Country for Customer Address (B17)* system control value defaults, but you can override it. Country codes are defined in and validated against the Country table. See *Setting Up the Country Table (WCTY)*. Alphanumeric, 3 positions; required or optional, based on country.
Delivery	Identifies a business (commercial) or residential address, and is used to calculate shipping charges for shippers that use rate tables (such as U.P.S.). The value in the *Default Delivery Code for New Order Entry Customers (D13)*system control value defaults here; however, you can override this default. If you clear this field and select *OK*, the system assigns the default delivery code to the shipping address. • *Business* = Business rate table determines shipping charges. • *Residential* = Residential rate table determines shipping charges. • *No Distinction* = No distinction between business and residence. Only *Business* and *Residential* are valid values for U.P.S. The system defines the shipper on an order as U.P.S. if the Type field in the Ship Via table = U; see *Working with Ship Via Codes (WVIA)*. Required.

Field	Description
Gift	Indicates whether the order is flagged as a gift. Valid values are: • *Selected* = This customer membership generates gift orders. • *Unselected* = This customer membership does not generate gift orders. Flagging an order as a gift can control: • how pick slips sort and break into documents • whether prices print on pick slips • printing of gift acknowledgments See *Performing Pick Slip Generation*. The *Default "Gift Order" Flag (D14)* system control value does not affect the default setting for this field.
Day	The customer's daytime phone number. Alphanumeric, 14 positions; optional.
Eve	The customer's evening phone number. Alphanumeric, 14 positions; optional.
Fax or Mobile	The customer's fax machine or mobile phone number. The *Third Phone Number Type (L53)* system control value determines the label for this field. Alphanumeric, 14 positions; optional.
Email address	The customer's email address. See *Email Address Validation* for an overview of how the system verifies that the email address you enter is formatted correctly. *Primary email address:* A plus sign (+) next to the email address indicates that there are additional email addresses on file for the customer; the email address on this screen is the customer's primary email address, which displays on screens that include the customer email address and defaults in order entry. If you enter a new email address, the address you enter becomes the customer's current primary email address, although the existing email addresses for the customer remain in the Customer Sold To Email table. *Entering a new email address:* If you overwrite the existing email address in this field, the system flags your entry as the primary email address for the customer, but retains the previous email address in the Customer Sold To Email table. In order to delete the previous email address, you need to prompt (by clicking on the right-facing arrow) to display the *Select Customer Email Address Screen* and delete the previous email address there. See *Working with Customer Email Addresses* for an overview. *Deleting the email address:* Similar to entering a new email address, if you delete the email address at this screen, the system removes the primary email flag for the address but retains the address in the Customer Sold To Email table. Alphanumeric, 50 positions; optional.

Generating Membership Orders (EGMO)

Purpose: Use the Generate Customer Membership Orders menu option to generate orders for standard customer memberships.

In this topic:

- *Generate Membership Orders Screen*
- *Membership Order Generation Process*
- *Release Membership Orders (RMEM)*
- *Memberships in Error Report*
- *Active Procedure Log*

Generate Membership Orders Screen

How to display this screen: Enter *EGMO* in the Fast path field at the top of any menu or select Generate Membership Orders from a menu.

Field	Description
Up to release date	The latest release date for the system to consider when evaluating customer memberships for order generation. Only standard memberships whose next release date is on this date or earlier are eligible to generate orders. The current date defaults, but you can override it. Numeric, 6 positions (in user date format); required.
Order date	The system assigns the date you enter here as the Order date and Entered date for each generated membership order; however, demand updates (such as Order Billing History) use the actual system date. The current date defaults, but you can override it to a future date. **Note:** The order date you enter here is included in the order confirmation email, even if you enter a future date. If the order is eligible for an order confirmation email and the order is in open or held status, the background job generates the order confirmation immediately, regardless of whether the order date is in the future. See *Updates During Background Processing* for a listing of tables updated by the ORDR_ASYNC job, including demand updates. Numeric, 6 positions (in user date format); required.

Field	Description
Select membership types	The membership type(s) for the system to consider when evaluating customer memberships for order generation. You can enter up to five membership types, or leave all these fields blank to evaluate all memberships regardless of type. Membership types are defined in and validated against the Membership Type table; see *Working with Membership Types (WWMT)*. *Discount-only memberships:* If you sell memberships for the purpose of applying a discount to customer orders, but that do not generate orders, you can use these fields to select other membership types and exclude the discount-only type. Otherwise, any discount-only memberships will appear on the memberships in error report because they do not include any items. **Note:** The system does not evaluate loyalty membership types for order generation. Alphanumeric, five 2-position fields; optional.

Instructions: Follow these steps at the *Generate Membership Orders Screen* to start the *Membership Order Generation Process*:

1. Complete the required fields and any optional fields as described above.
2. Select *OK*. The system validates your entries and highlights any fields you need to correct. Correct any fields and select *OK* again.
3. Select *Generate Orders*.

For more information: See *Membership Overview*.

Membership Order Generation Process

Process overview: You can choose to generate membership orders based on the membership type and release date. When you begin the generation process, the system starts the *GEN_ORDERS* job, which:

#	Step
1.	Selects each customer membership that is eligible to generate an order, based on the membership's status (which must be active) and next release date (which must be on or earlier than the selection date). If you specify one or more membership types, the membership must be one of the specified types, as well.
2.	Evaluates the customer membership for errors, and includes these memberships on the *Memberships in Error Report*. Errors are: • Incomplete or incorrect payment information • No items for the current rotation
3.	Selects each item to include on generated orders, based on the item's status (which must be active) and the rotation number (which must be the same as the current rotation for the membership header or the rotation must be 1 or zero, indicating to always include the item).

#	Step
4.	Creates orders, which it then evaluates in the same way as orders you create through the generic order API; this edit flags errors such as a missing item price or invalid SCF/ship via combination.
5.	Automatically assigns the “best way” ship via with the lowest overall shipping charges to the order if the ship via for the customer membership matches the *Best Way Ship Via for Auto-Assignment (J67)*; see that system control value for more information.
6.	When creating the order payment method for the order, uses the CIT Transaction ID and the original authorization amount from the customer membership, if they are populated, identifying the order as a subsequent card-holder initiated transaction with credentials on file. These fields would be populated through the integration with CyberSource or through the External Payment Service, either through the order originating the customer membership, or through a generated order that was authorized through CyberSource or the External Payment Service. Otherwise, these fields on the payment method for the generated order are updated when the order is authorized through CyberSource or the External Payment Service, and in this case the customer membership is also updated with these fields. **For more information:** See: • *CyberSource:* *Subsequent Authorizations to CyberSource for Membership Orders* and *Subsequent Authorization Requests to CyberSource*. • *External Payment Service:* *Subsequent Authorizations through the External Payment Service for Membership Orders* and *Subsequent Authorization Requests through the External Payment Service*.
7.	Updates the customer membership: • Changes the Last order date to the Order date specified at the *Generate Membership Orders Screen*. • Changes the Next release date to the next date when the customer membership will be eligible for order generation, based on the order date and the Shipment interval or Fixed shipment day. • Increments the Next rotation if the customer membership includes items that are assigned to different rotations; otherwise the Next rotation remains *1* or *0*. • Increments the Shipments (# Shp) total. • Changes the customer membership status to *Complete* if the total number of rotations has been met.
8.	Writes an order message to the generated order indicating the name of the membership program and the Next release date if the *Write Order Messages for Membership Rotation (K04)* system control value is selected. This order message is flagged to print on the pick slip, and the user ID identifies the user who submitted the membership generation job. See the system control value for more information.
9.	Assigns the suspended membership orders to an order batch. The batch is assigned to the user ID of the user who submitted the membership generation job.
10.	Puts orders with errors in *Error* status.
11.	Puts orders that are error-free in *Open* or *Held* status, removes the batch number from the order header, and applies pick slip preparation to the eligible orders; see *Applying Pick Slip Preparation to an Order*.

#	Step
12.	Updates the customer membership with the next release date, shipment number, and rotation; also, changes the status if the current order completes the membership.

> **Note:**
>
> The *GEN_ORDERS* job runs in the *QSYSNOMAX* job queue rather than the default *QBATCH* job queue in order to reduce conflicts with other submitted jobs.

Generated reports: The *GEN_ORDERS* job produces:

- *Memberships in Error Report*
- Order Batch Listing. See *Accepting or Rejecting the Order Batch* for more information on this report.

Orders in error: Any membership orders that have any errors remain suspended in the generated batch. Use the *Edit/Accept* option on the *Work with Error Orders Batches Screen* to submit the batch to edit so that you can review the errors and then advance to an individual order in error so that you can correct it. See *Accepting or Rejecting the Order Batch* for more information.

Which order date to use? The system uses the *Order date* you enter at the *Generate Membership Orders Screen* as the Order date and Enter date for generated membership orders; however, all other updates are posted using the current date. For example, records in the Order Billing History table are created using the current date.

Active procedure check: Before the order accept process runs, the system checks to see whether there is already an order generation (*GEN_ORDERS*) job that is active in your company. If there is currently an active order generation job, the system stops the newly submitted job and generates the *Active Procedure Log*.

Loyalty memberships: The program ignores any loyalty memberships when generating membership orders. See *Loyalty Memberships* for an overview.

Tokenization: If a customer membership is purchased with a credit card, the cardToken and customerToken captured on the payment in the Original/Parent order is stored with the Customer Membership (WWCM) record. When the child membership order is generated (EGMO), it stores those same tokens with the Order Payment Method.

Email address? If the customer sold-to has a primary email address, this address defaults as the order-level email address; otherwise, there is no order-level email address assigned. See *Generating Membership Orders (EGMO)* for more information.

Membership orders without existing customer memberships: It is possible for the system to generate a membership order for which you cannot find the associated customer membership in the following situation:

1. You receive an order that includes a membership item and that is in error for some reason. For example, you receive an order through the order API, and the order includes both a membership item and another order detail line that is in error status because it failed an edit related to order line quantity. In this situation, the

system creates the customer membership even though the order is in suspended status.

2. You run *Generating Membership Orders (EGMO)* and generate the membership order for the customer membership created through the suspended order.
3. You then reject the order or the order batch, removing the suspended order that originated the customer membership.

Because the customer membership no longer exists, the system does not generate any additional membership orders for the customer.

Cancelling the membership item: If you cancel the membership item on the order that originated the customer membership after you have used the membership generation process, a pop-up window opens:

1. *If a membership order has already been generated:* The *Order Warning Message Window* indicates that one or more membership orders have already been generated for the customer membership, and that you need to cancel the generated orders manually; however, canceling the membership item results in canceling the remainder of the customer membership, so the program will not generate any additional orders.
2. *If the membership generation program is currently running, or if it has generated an order but the order is still suspended in batch:* The *Membership in Process Window* indicates that the membership is currently being processed. You will need to cancel the generated order and the customer membership to prevent additional orders from being generated.

See *Canceling a Membership Item* for more information.

Release Membership Orders (RMEM)

Purpose: This option is not currently implemented.

Printing the Expected Membership Orders Report (PEMO)

Purpose: Use the Expected Membership Orders report to review the total number of membership orders that will be available for generation for a range of dates. The system uses the Next release date from the customer membership to calculate these totals. This report provides a summary of total quantity by date only, and does not include detail information on the membership programs, membership types, customers, or items.

For more information: See *Membership Overview* for an explanation of how membership programs work, or see *Generating Membership Orders (EGMO)* for information on how to generate orders for membership programs.

Loyalty memberships: This report does not consider loyalty memberships, which do not generate orders. See *Loyalty Memberships* for an overview.

In this topic:

- *Print Expected Membership Orders Screen*
- *Expected Membership Orders Report*

Print Expected Membership Orders Screen

How to display this screen: Enter *PEMO* in the Fast path field at the top of any menu or select Print Expected Membership Orders from a menu.

Field	Description
Starting with release date	The first release date to include on the *Expected Membership Orders Report*. The system includes customer memberships whose Next release date is on this date or later. The current date defaults. Numeric, 6 positions (in user date format); required.
Ending with release date	The last release date to include on the *Expected Membership Orders Report*. The system includes customer memberships whose Next release date is on this date or earlier. The current date defaults. Numeric, 6 positions (in user date format); required.

Completing this screen: Select *Submit* to generate the report. You return to a menu, and the system submits the *EXP_ORDERS* job.

Update Customer Memberships (MMCM)

Purpose: Use this option to update the source code and/or any one item on customer memberships and, optionally, the membership program itself.

For more information: See:

- *Membership Overview*
- *Working with Membership Programs (WWMP)*
- *Working with Customer Memberships (WWCM)*
- *Generating Membership Orders (EGMO)*

> **Note:**
>
> Even if a membership program is flagged not to allow changes based on the membership type, you can still process updates through the this menu option.

Update Customer Memberships Screen

How to display this screen: Select Update Customer Memberships from a menu or enter *MMCM* in the Fast path field on any menu.

Field	Description
Membership ID	Enter the codes identifying the membership program(s) for which you would like to update the source codes and/or items on customer memberships. You can enter up to four membership programs. Entry of at least one membership program is required. **Restrictions:** The system does not verify whether there are any active customer memberships for the program(s) you enter, whether the membership program is currently active, or whether you are entering a type of membership program that actually generates orders. However, you cannot enter an Item to be Replaced and a New Item unless there is at least one customer membership for at least one of the membership program(s) you enter here. Alphanumeric, four 12-position fields; entry of the first field required.
Source Code	Optionally, enter the source code to assign to existing customer memberships. You can assign this source code to each selected membership program by selecting the Update Membership Program flag. You can enter a source code only if it is not restricted. **Effects of update:** • Updating the customer memberships means that all newly-generated membership orders for the selected membership program(s) will use that source code. Existing membership orders that were previously generated are not affected. *Example:* You enter the membership ID's of MEMB01 and MEMB02 and enter a Source Code of MBS23. When you select *OK*, the system changes the source code for all MEMB01 and MEMB02 customer memberships to MBS23. If you generate membership orders tomorrow, the generated orders will have source code MBS23. However, orders you generated yesterday are still assigned to the source code(s) previously assigned to the MEMB01 and MEMB02 customer memberships. • Updating the membership program(s) means that all newly-created customer memberships will be assigned to that source code, so that all generated membership orders for the selected membership program(s) will also use that source code. *Example:* To continue the example above, you also update the MEMB01 and MEMB02 membership programs themselves. The next time you create a customer membership, it will be assigned to the MBS23 source code by default. Alphanumeric, 9 positions; optional (required if you do not enter an Item to be Replaced and a New Item).

Field	Description
Item to be Replaced	Optionally, enter the item (and SKU, if the item has SKUs) to remove from existing customer memberships and replace with the New Item. You can also remove this item and SKU from each selected membership program and replace it with the New Item by selecting the Update Membership Program flag. **Restrictions:** You cannot perform an item update on just membership programs if the Item to be Replaced is not on at least one customer membership for one of the selected programs. To update just the membership programs, use *Working with Membership Programs (WWMP)*. However, once you attempt to enter an Item to be Replaced, you cannot clear the item fields and submit just a source code update; instead, you need to exit the screen and re-enter. **Effects of update:** • Updating the customer memberships means that all newly-generated membership orders for the selected membership program(s) will not include this item/SKU. Existing membership orders that were previously generated are not affected. *Example:* You enter the membership ID's of MEMB01 and MEMB02, enter an Item to be Replaced of AB0101 SMLL, and enter a New Item of BC0202. When you select *OK*, the system removes the item AB0101 SMLL for all MEMB01 and MEMB02 customer memberships, and adds BC0202. If you generate membership orders tomorrow, the generated orders will include BC0202. However, orders you generated yesterday still include AB0101 SMLL. *Example:* To continue the example above, you also update the MEMB01 and MEMB02 membership programs themselves. The next time you create a customer membership, it will include BC0202 (but not AB0101 SMLL) by default. **Note:** The system adds the New Item to the customer membership (and, optionally, membership program) only if the Item to be Replaced was already on the customer membership or membership program. For example, if you entered membership programs MEMB01, MEMB02, and MEMB03, but only customer memberships for MEMB01 included the Item to be Replaced, then customer memberships for MEMB02 and MEMB03 are not updated when you select *OK*. Alphanumeric, 12 positions with three four-position SKUs; optional (required if you do not enter a Source Code).

Field	Description
New Item	Enter the item (and SKU, if the item has SKUs) to add to existing customer memberships when removing the Item to be Replaced. You can also add this item and SKU to each selected membership program by selecting the Update Membership Program flag. See the Item to be Replaced field, above, for a discussion. **Restrictions:** You cannot enter a New Item unless you are replacing an item that is already on customer memberships (and, optionally, the selected membership program(s)). Alphanumeric, 12 positions with three four-position SKUs; required if you enter an Item to be Replaced.
Update Membership Program	Indicates whether to update the selected membership program(s) in addition to the existing customer memberships with the indicated source code and/or item replacement: *Selected* (default) = Update each selected membership program with the source code; also, if the Item to be Replaced is on the membership program, replace it with the New Item *Unselected* = Do not update any of the membership programs

Completing this screen:

1. Complete each field as described above.
2. Select *OK* to validate your entries. See the field descriptions above for more information.
3. Once you have completed each required field, select *OK* to update each eligible customer membership and membership program, if applicable. The update takes place interactively.

Email Repository

In this part:

- *Working with Email Category (WEMC)* provides information on setting up categories for tracking and grouping emails.
- *Working with Email (WEML)* provides information on reviewing unrouted emails and assigning them to customers and orders.
- *Purging Email History (MPCH)* provides information on purging emails earlier than a given date.
- *Updating Email Domains (MUEE)* provides information on making universal updates to the domain name for all matching email addresses in your company.
- *Printing the Email Error Report (PEME)* provides information on printing a report listing all email addresses in your company that do not conform to formatting requirements.

Working with Email Category (WEMC)

Purpose: Use email categories to group email correspondence for scanning or informational purposes. You can assign an email category to an email at various screens where you work with email correspondence.

Notification category: The system uses the *NTF* category for any email notification generated by the system. For example, when you use the *Generate Backorder Notices*

(GBOC) menu option, the system assigns an email category of *NTF* to each backorder notification email generated. The system automatically creates the *NTF* category the first time that you advance to the Work with Email Category Screen.

> **Note:**
>
> The system saves outbound notification emails only if the *Write Outbound Email to Email Repository (H99)* system control value is *selected*.

For more information see the *Email Repository Overview* in the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

In this topic:

- *Work with Email Category Screen*
- *Create Email Category Screen*

Work with Email Category Screen

How to display this screen: Enter *WEMC* in the Fast path field at the top of any menu, or select Work with Email Category from a menu.

Field	Description
Category	The category that you use to group email correspondence between you and your customers. Enter a full or partial category to display email categories in alphanumeric order, starting with your entry. Alphanumeric, 3 positions; optional.
Description	The description of the category. Enter a full or partial description to display email categories in alphanumeric order that contain your entry. Alphanumeric, 40 positions; optional.

Option	Procedure
Create an email category	Select *Create* to advance to the Create Email Category Screen.
Change an email category	Select *Change* for a category to advance to the Change Email Category screen. You can change the Description. See Create Email Category Screen for field descriptions.

Option	Procedure
Delete an email category	Select *Delete* for a category to delete it. **Note:** The system does not prevent you from deleting a category that is currently assigned to one or more emails.
Display an email category	Select *Display* for a category to advance to the Display Email Category screen. See Create Email Category Screen for field descriptions. You cannot change any information on this screen.

Create Email Category Screen

Purpose: Use this screen to create a new email category.

How to display this screen: Select *Create* at the Work with Email Category Screen.

Field	Description
Category	The category that you use to group email correspondence between you and your customers. Alphanumeric, 3 positions. Create screen: required. Change screen: display-only.
Description	The description of the category. Alphanumeric, 40 positions; required.

Working with Email (WEML)

Purpose: Use Work with Email to review and work with emails that have been forwarded into Correspondence History and that are in error. **For more information:** See *Email Repository Overview* the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1) for more information on how the system processes forwarded emails.

Possible error reasons include:

- the email did not include sufficient information to assign it to a customer
- the email included conflicting information: for example, it specified a customer number and an order number, but the order number is not valid for that customer
- the email included invalid information, such as an email category that does not exist
- the email address in the email does not match an existing customer

- there is more than one customer with the email address in the email (**Note:** This condition produces an error only if the *Assign Unreferenced Email (H93)* system control value is set to **DUPE*)

In this topic:

- *Work with Unrouted Email Screen*
- *Change Email Screen*
  - *Identifying an Unrouted Email*
- *Display Email Screen*
- *Display Email Detail Screen*
- *Symbol and Special Character Conversion in Emails*

Work with Unrouted Email Screen

How to display this screen: Enter *WEML* in the Fast path field at the top of any menu, or select Work with Unrouted Email from a menu.

Field	Description
Date	The date when the email was forwarded into the system. You can select *Sort by email date* to display the date when an email was originally sent (the *Email sent* date) rather than the date when it was forwarded into the system and the Correspondence History record was created (the Created on date). Similarly, after you have selected to display the Email sent date, you can select *Sort by create date* to switch the displayed date back to the Created on date. Numeric, 6 positions (in user date format); optional.
Src (Source)	Indicates whether the email was inbound or outbound. Valid values are: • *EXT* = the email was forwarded into Order Administration • *INT* = the email originated in Order Administration and was sent to a customer. A user-supplied code indicating the email's source is not currently implemented. Normally, only inbound (*EXT*) emails are listed on this screen as unrouted. Alphanumeric, 3 positions; optional.

Field	Description
Rsn (Reason)	The reason why the system did not assign the email. Possible reasons are: • *Duplicate* = The email address for the forwarded email matched more than one customer (**Note:** This condition produces an error only if the Assign Unreferenced Email (H93) system control value is set to **DUPE*). The system searches the Customer Sold To Email and Customer Ship To tables, and if the system finds more than once occurrence of the email address in all of these tables, it puts the email in *Duplicate* status. • *Invalid value* = The email was flagged with identifiers that include invalid information. Possible reasons include: • The email Category is not valid • The ship-to customer does not exist for the sold-to customer • The customer cross-reference code does not match the customer number indicated • The Order cross reference or Customer cross reference are not valid • *Mismatch* = The email was flagged with identifiers that are inconsistent. Possible reasons include: • The order number indicated is invalid for the sold-to customer • The order cross-reference code does not match the order number indicated • *Undeterminable* = The email did not include enough information to assign it to a customer. To determine the specific error(s) for an email, select *Change* for an email to advance to the Change Email Screen, where the system displays an error message. See *Email Repository Overview* for general information. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Optional.
Cat (Category)	A category that you use to group email correspondence between you and your customers. A category of *NTF* indicates that the email was a notification generated by the system and sent to the customer. Alphanumeric, 3 positions; optional.
Email address	The email address of the person who originated the email. Alphanumeric, 50 positions; display-only.

Option	Procedure
Change an unrouted email	Select *Change* for an email to advance to the Change Email Screen.
Delete an unrouted email	Select *Delete* for an email to delete it.
Display an unrouted email	Select *Display* for an email to advance to the Display Email Screen.

Option	Procedure
Create a tickler for the *MN* (manually created) tickler event	Select *Create tickler* for an email to advance to the *Create Tickler Screen*.
Display email subject and text	Select *Display detail* for an email to advance to the Display Email Detail Screen.
Change display sequence by date	Select *FIFO* to display emails in ascending chronological order (earliest to latest). Similarly, once *FIFO* is selected, Select *LIFO* to display emails in descending chronological order (latest to earliest).
Change displayed date to the date email was originally sent	Select *Sort by email date* to display the date when an email was originally sent (the *Email sent* date) rather than the date when it was forwarded into the system and the Correspondence History record created (the Created on date). Similarly, after you have selected to display the Email sent date, you can select *Sort by create date* to switch the displayed date back to the Created on date. You can use this option together with selecting *FIFO* to display emails in ascending or descending chronological order based on Created on date or Email sent date. The four possible sort options are: • LIFO by Create Date • FIFO by Create Date • LIFO by Email Date • FIFO by Email Date The current sort is indicated in the upper left corner of the screen.

Change Email Screen

Purpose:

- *Unrouted email:* An unrouted inbound email is an email that originated from a customer but has not been assigned to a customer because of insufficient or invalid identifying information. Use this screen to review the specific errors and other detail information, correct any errors, and assign the email. Any fields that are in error are highlighted when you advance to this screen, and an error message indicates the nature of the error.
- *Routed email:* A routed email is an inbound email or outbound email notification that is assigned to an customer and, potentially, additional records such as an order, bill-to customer, or purchase order. Use this screen to review detail information or to reassign the email differently if you have the proper authority; the *Changed Routed Email (B08)* secured feature controls access to this screen for routed (assigned) emails. If you do not have authority to change a routed email, you can use the *Display Email Screen* to review all of this information.

How to display this screen: Select *Change* for an email at the:

- *Work with Unrouted Email Screen*
- *Work with Email by Order Number Screen*
- *Work with Email by Customer Sold To Number Screen*

- *Work with Email by Customer Ship To Number Screen*
- *Work with Email by Customer Bill To Number Screen*

Field	Description
Created on	The date and time that the email was received into Order Administration and the Correspondence History record was created. Date: numeric, 6 positions (in user date format); display-only. Time: numeric, 6 positions (HH:MM:SS format); display-only.
Email sent	The date and time when the email originated. This is not the date and time when you forwarded an external email into Order Administration, but the date and time when a forwarded email was originally sent. Because the date and time on an external systems can be set differently, it is possible for there to be discrepancies between this date and the date when the email record was created in Order Administration. In the case of an email notification generated by the system, the dates created and sent should be identical. Date: numeric, 6 positions (in user date format); display-only. Time: numeric, 6 positions (HH:MM:SS format); display-only.
Subject	The subject line of the email. • *Inbound emails:* Things to note: • Depending on the setup at the email site, when you forward an email into Order Administration, the system typically deletes `FW:` from the beginning of the subject line; however, if the email has been forwarded multiple times, only the first occurrence will be deleted. • The system renders the text of the subject line in all capital letters. • The subject line is truncated if it exceeds the maximum length of this field. • The system converts certain special characters. See *Symbol and Special Character Conversion in Emails*. • The system deletes the email identifiers from the subject line if translation is successful. For example, a subject line reading `FW: COMPANY=27;CUSTOMER=613;ATTACHMENT=N; Where is my order?` would be translated to `WHERE IS MY ORDER?` Even if translation is successful, however, it does not necessarily mean that the email is assigned to a customer; it is possible for the email identifiers to be formatted correctly, but for the values specified to be incorrect or inconsistent. • *Outbound emails:* Possible subject lines for outbound email notifications are: • ORDER CONFIRMATION • Credit Card Credit Acknowledge • SOLD OUT NOTIFICATION • Shipment Confirmation • BACKORDER NOTIFICATION • Return Confirmation • ORDER UPDATE CONFIRMATION Alphanumeric, 78 positions; display-only.
Email address	The email address of the person who originated the email. Alphanumeric, 50 positions; display-only.

Field	Description
Display name	The name associated with the email address. Depending on the original email application, a forwarded message might include either the display name or the actual email address: *Uses actual email address:* `-----Original Message-----` `From: lak@example.com` `Sent: 08/09/2006 10:33:38 AM` *Uses display name:* `-----Original Message-----` `From: Harry Truman` `Sent: 08/09/2006 10:33:38 AM` Alphanumeric, 50 positions; display-only.
CC	The email addresses that were sent copies of the email. This field is truncated if the original information exceeded the maximum length in Order Administration. Alphanumeric, 50 positions; display-only.
Source	Indicates whether the email was inbound or outbound. Valid values are: • *EXT* = the email was forwarded into Order Administration • *INT* = the email originated in Order Administration and was sent to a customer. A user-supplied code indicating the email's source is not currently implemented. Alphanumeric, 3 positions; display-only.
Routed	Indicates whether the email has been assigned to a customer. Valid values are: • *selected* = The email has been assigned to a customer and information such as an order, vendor, bill-to customer, and ship-to customer, if applicable. • *unselected* = The email has not yet been assigned.
Attachment	Indicates if there was a file attached to the email. Attachments to emails forwarded into Order Administration are discarded; however, if you forward the email using the Outlook form, the form adds a flag to the subject line indicating that the email originally had an attachment. An attachment could be any sort of file that is sent along with the email, such as a document, image, script, or program. Valid values are: • *selected* = The email had an attachment that was discarded. • *unselected* = The email did not have an attachment.

Field	Description
Error reason	The reason why the system did not assign the email. This field is set only for unrouted emails. Possible reasons are: • *Duplicate* = The email address for the forwarded email matched more than one customer (**Note:** This condition produces an error only if the *Assign Unreferenced Email (H93)* system control value is set to **DUPE*). The system searches the Customer Sold To Email, and Customer Ship To tables, and if the system finds more than once occurrence of the email address in all of these tables, it puts the email in *Duplicate* status. • *Invalid value* = The email was flagged with identifiers that include invalid information. Possible reasons include: • The email Category is not valid • The ship-to customer does not exist for the sold-to customer • The customer cross-reference code does not match the customer number indicated • The Order cross reference or Customer cross reference are not valid • *Mismatch* = The email was flagged with identifiers that are inconsistent. Possible reasons include: • The order number indicated is invalid for the sold-to customer • The order cross-reference code does not match the order number indicated • *Undeterminable* = The email did not include enough information to assign it to a customer. See *Email Repository Overview* for general information. For more information see the Web Services Guide on My Oracle Support (ID 2953017.1). Alphanumeric, 1 position; display-only.
Category	A category that you use to group email correspondence between you and your customers. A category of *NTF* indicates that the email was a notification generated by the system and sent to the customer. Category codes are defined in and validated against the Correspondence Category table; see *Working with Email Category (WEMC)*. Alphanumeric, 3 positions; optional.
Order number	The order number and order ship-to number, if any, related to the email. The order ship-to number is separated from the order number by a hyphen (-). See *Identifying an Unrouted Email* for information on completing or correcting these fields for an unrouted email. Order number: numeric, 8 positions; optional. Order ship-to number: numeric, 3 positions; optional.

Field	Description
Customer reference number	A cross-reference code available to identify the customer with a record in another system. Validated against the Alt customer # field at the second Create Customer screen in customer maintenance, or an Alternate customer # cross reference from the Alternate Customer # Cross Reference table (see *Working with Alternate Customer Number Cross-References*). **Note:** If the *Display Alternate Customer Cross Reference Window (I84)* system control value is *selected*, the system selects the last customer numerically (that is, the most recently created customer) who matches based on the primary Alt customer # from the Customer Sold To table, if any; otherwise, it selects the last customer numerically who matches based on the Alternate customer # cross reference. If the *Display Alternate Customer Cross Reference Window (I84)* system control value is *unselected*, the system selects the last customer numerically who matches based on the Alternate customer # cross reference, regardless of whether there is also a match based on the Alt customer #. See *Identifying an Unrouted Email* for information on completing or correcting this field for an unrouted email. Alphanumeric, 15 positions; optional.
Order reference number	A cross-reference code available to identify the order with a record on another system. Validated against the E-commerce order number field in the Order Header Extended table; this field is displayed as the Alternate order field at the *Display Order Properties Screen*. See *Identifying an Unrouted Email* for information on completing or correcting this field for an unrouted email. Alphanumeric, 35 positions; optional.
Customer sold to	A number identifying the sold-to customer associated with the email. Validated against the Customer Sold To table. If a sold-to number is identified, the customer's company name, if any, and name appear to the right. See *Identifying an Unrouted Email* for information completing or on correcting this field for an unrouted email. Customer number: numeric, 9 positions; optional. Customer name: alphanumeric, 41 positions; display-only.
Customer ship to	A number identifying a permanent shipping address associated with a sold-to customer. See *Identifying an Unrouted Email* for information on completing or correcting this field for an unrouted email. Numeric, 3 positions; optional.

Field	Description
User code 1	A field available to enter a one-position code or flag. Not validated against any table. Alphanumeric, 1 position; optional.
Customer bill to	A number identifying a customer responsible for payment on an order. Validated against the Customer Bill To table. See *Identifying an Unrouted Email* for information on completing or correcting this field for an unrouted email. Numeric, 7 positions; optional.
User code 2	A field available to enter a 10-position code. Not validated against any table. Alphanumeric, 10 positions; optional.
Invoice number	A number identifying the invoice with which an order was billed or credited. Validated against the Invoice Header table. See *Identifying an Unrouted Email* for information on completing or correcting this field for an unrouted email. Numeric, 7 positions; optional.
User code 3	A field available to enter a 20-position code. Not validated against any table. Alphanumeric, 20 positions; optional.
Vendor number	A number identifying a vendor who supplies you with merchandise. Validated against the Vendor table. Ordinarily used here only for drop shop purchase orders associated with an order. See *Identifying an Unrouted Email* for information on completing or correcting this field for an unrouted email. Numeric, 7 positions; optional.
User number	A field available to enter a 13-position number. Not validated against any table. Numeric, 13 positions; optional.
Purchase order number	A number identifying a purchase order. Validated against the PO Header table. Ordinarily used here only for drop ship purchase orders associated with an order. See *Identifying an Unrouted Email* for information on completing or correcting this field for an unrouted email. Numeric, 7 positions; optional.
User date	A field available to enter a date. Numeric, 6 positions (in user date format); optional.

Option	Procedure
Display the text of the email	Select *Display email detail* to advance to the Display Email Detail Screen.

Option	Procedure
Advance to standard order inquiry	Select *Order inquiry*. If the email is associated with an order number, you advance to the Order Inquiry Header Screen or the Order Inquiry Detail Screen, depending on the setting of the *Default Version for Order Inquiry (C34)* system control value. If the email is not associated with an order number, you advance to the *Order Inquiry Scan Screen*. **Note:** This option is not available when you are working with a routed email in standard order inquiry.
Accept your entries and assign the email	After you have identified the email, select *Accept*. See Identifying an Unrouted Email below for more information. **Note:** This option is available only if you have the proper authority, based on the *Changed Routed Email (B08)* secured feature.

Identifying an Unrouted Email

You can associate an email with any of the following:

- order-related information:
  - *Order number* and order ship-to number
  - *Customer sold to* number
  - *Customer ship to* number
  - *Customer bill to* number
  - *Invoice number*
  - *Purchase order number* (for drop shipments)
  - *Vendor number* (for drop ship purchase orders)
  - *Order reference number*
- customer-related information:
  - *Customer sold to* number
  - *Customer ship to* number
  - *Customer reference number*
- *Vendor number* and *Purchase order number*

To associate an email with any of the above types of information, complete the field or prompt for a list of valid values.

When you complete a field, the system:

- *Fills in the related fields if it can positively identify them.* For example, when you enter an order-related field such as the order number, the system fills in the customer sold-to number and the following related fields if they exist on the order:
  - Customer ship-to number
  - Customer bill-to number
  - Order reference number
- *Confirms that all entries on the screen are consistent.* For example, if you complete the order number and the customer reference number, but the customer reference number is not correct for the customer sold-to on the order indicated, the system displays an error message.

Things to note: The system does *not*:

- Fill in a field if more than one possible relationship exists. For example, when you enter the order number, the system does not fill in the invoice number, because it is possible for an order to have more than one invoice.
- Confirm a relationship between a vendor number and order-related or customer-related information; however, the system does confirm that a purchase order number is consistent with a vendor number if you enter both, and fills in the vendor number if you enter just the purchase order number. The exception is drop ship purchase orders, in which the vendor number and purchase order number are validated as order-related information.
- Confirm a relationship between customer-related information and a bill-to number, unless order-related information is also identified.
- Assign the email if you specify just a bill-to customer without specifying a sold-to customer. The system accepts your entry, but leaves the email in unrouted status.

Selecting the correct customer or order: Select *Order inquiry*. If you have selected an order number, you advance to the Order Inquiry Header Screen or the Order Inquiry Detail Screen, depending on the setting of the *Default Version for Order Inquiry (C34)* system control value. You can review the order and customer information at these screens to see if they are consistent with what you know about the email.

If you have not selected an order number, you advance to the *Order Inquiry Scan Screen*. At these screens, you can scan on customer name or email address to help you identify the originator of the email and the related order, if appropriate.

When you have completed your inquiry, select *Exit* to return to the Change Email screen, where you can enter the appropriate information.

Accepting your entries: If there are no errors, select *Accept* to accept your entries and assign the email.

Rejecting your entries: Select *Exit* to exit the screen without accepting your entries. If you advanced to this screen from the Work with Unrouted Email Screen, a pop-up window prompts you to confirm that you are exiting.

Click *Accept changes* to accept your changes, *OK* to exit the screen without saving your changes, or *Exit* to return to the Change Email screen.

Display Email Screen

Purpose: Use this screen to review detailed information about an email. You cannot change any information at this screen. See *Change Email Screen* for field descriptions.

How to display this screen: Select *Display* for an email at the:

- *Work with Unrouted Email Screen*
- *Work with Email by Order Number Screen*
- *Work with Email by Customer Sold To Number Screen*
- *Work with Email by Customer Ship To Number Screen*
- *Work with Email by Customer Bill To Number Screen*

Display Email Detail Screen

Purpose: Use this screen to review the content of an email.

> **Note:**
>
> The system does not save the text of outbound email notifications, which are identified by a *Src (Source)* of *INT* (internal) and a Cat (Category) of *NTF* notification; however, you can review the subject line at the *Change Email Screen* or the *Display Email Screen* to determine the type of notification that was sent. The system saves a record of email notifications only if the *Write Outbound Email to Email Repository (H99)* system control value is *selected*.

How to display this screen:

- Select *Display detail* for an email at the:
  - Work with Unrouted Email Screen
- *Work with Email by Order Number Screen*
- *Work with Email by Customer Sold To Number Screen*
- *Work with Email by Customer Ship To Number Screen*
- *Work with Email by Customer Bill To Number Screen*
- Select *Display email detail* at the:
  - *Change Email Screen*
  - *Display Email Screen*

Email text: The contents of the email are presented on this screen. The *Email Presentation (I01)* system control value controls the extent to which blank line spaces in the email are consolidated.

Field descriptions: See the *Change Email Screen* for a description of the remaining fields on this screen.

Symbol and Special Character Conversion in Emails

Emails are stored in the Correspondence History table in plain text. The table below describes how some commonly used symbols and special characters are rendered.

Symbol/character appearance	Description	Converted to:
<	left angle bracket	`<`
—	em dash	– (hyphen)
–	en dash	– (hyphen
	non-breaking space	space
©	copyright symbol	¤
®	registration symbol	«
™	trademark	`(tm)`
¼	1/4	Ê
½	1/2	Ë
§	section symbol	°
¶	paragraph symbol	Ã
abcde	symbol font	`abcde` (regular text)

The following characters are deleted from the email:

- ~ (tilda)
- | (pipe)
- optional hyphen
- em space
- en space

Purging Email History (MPCH)

Purpose: Use this menu option to purge email correspondence history created before a specific date. You might want to use this menu option to conserve disk space if the Correspondence History and Correspondence History Detail tables are large.

The system uses the creation date to determine the age of the email rather than the sent date.

Correspondence history related to open or held orders is not purged, regardless of date.

Purge Correspondence History Screen

The Date field on this screen defaults to blank; you must enter the earliest date for which you want to retain email correspondence history.

How to display this screen: Enter *MPCH* in the Fast path field at the top of any menu or select Purge Correspondence History from a menu.

Completing this screen: Enter the earliest date for which you want to retain email correspondence history and click *Accept*.

Updating Email Domains (MUEE)

Purpose: Use this function to universally update email addresses for a domain name. For example, you would use this function if ABC Corp. changed its name to XYZ Corp., and as a result all of its employees' email addresses now end with *@xyz.com* instead of *@abc.com*.

Components of an email address: For the purposes of this menu option, the system searches for and replaces the domain name and/or the extension. For example, in *direct@example.com*, *example* is the domain name and *com* is the extension. These are the only components of an email address that you can update through this menu option. The entire domain name and extension must be an exact match; for example, *@mail.com* is not a match for *@123mail.com*.

When you use this function, the system updates the domain name for all matching email addresses in the following tables:

- Customer Sold To
- Customer Sold To Email
- Customer Ship To
- Customer Bill To
- Vendor (both vendor email and remittance email addresses)
- Vendor Contact
- Order Ship To Address
- OM Batch Header
- Soldout Notification
- Threshold Value

Update Email Address Domain Screen

How to display this screen: Enter *MUEE* in the Fast path field at the top of any menu, or select Update Email Address Domain from a menu.

Completing this screen: Enter the domain name that you want to change and the domain name you want to change it to. Your entry must include the correct position of the @ sign and the period: the domain name must begin with the @ sign, and the period must be followed by an extension, such as *com* or *gov*, of one or more characters. For example, the following are correctly formatted domain names for this menu option:

- @example.com
- @mailcity.org
- @university.edu

The system rejects any domain names formatted like:

- oracle.com
- @example

> **Important:**
>
> The system does not verify that your entry is actually a valid, existing domain name.

Once you have entered the original and new domain names, Select *Accept* to submit. The system starts the *UPDEMLDOM* job and displays the following messages:

```
The update email address domain job has been submitted.
```

Printing the Email Error Report (PEME)

Purpose: Use this screen to generate a list of email addresses that are formatted incorrectly in the following tables:

- Customer Sold To
- Customer Sold To Email
- Customer Ship To
- Customer Bill To
- Vendor (both vendor email and remittance email addresses)
- Vendor Contact
- Order Ship To Address
- OM Batch Header
- Soldout Notification
- Threshold Value

In this topic:

- *When is an Email Address in Error?*
- *Email Errors Report Screen*
- *Email Errors Report*

When is an Email Address in Error?

An email address is considered in error if:

- there is not an @ sign and a period (.)
- there is no text:
- before the @ sign
- between the @ sign and the period
- after the period

For example, the following email addresses would appear on the error report:

- @example.com
- sbrown@example
- sbrown@.org
- www.example.com

Any additional validation? The system does not confirm that an entry represents a valid email address, or that the domain name (such as "company" in company.com) even exists.

Email Errors Report Screen

How to display this screen: Enter *PEME* in the Fast path field at the top of any menu, or select Email Error Report from a menu.

Completing this screen: Click *Accept* to submit the *Email Errors Report*.

Customer Service Appendices

Purpose: These topics provide reference information for use throughout the system.

- Displaying More Options in OIOM describes several options related to Order Inquiry, Order Maintenance and Order Entry that are not available on the regular screens.
- Work with Customer Action Notes (WCAN): Use this menu option when you want to view or work with a list of all customer action issues for a company
- *Loading Address Updates* describes how to load and process a table containing Sold To Customer address updates, and how to review changed and unchanged customer information.
- Process Address Changes Screen (PACS): Use this screen to process address changes when the ACS Tape or the MBS Tape tables are already loaded with address change information.
- Work with Changed Customers Screen (MBSI): Use this screen to review the customer's name and address before and after the address updates
- Work with Unchanged Customers Screen (MBSF)

Work with Customer Action Notes (WCAN)

Purpose: Use this menu option when you want to view or work with a list of all customer action issues for a company. Using this menu option, you can delete, display, resolve, update the status of an issue, or attach detail notes for a customer action issue, by using options similar to those on the *Edit Customer Actions Window*. At the Work with Customer Actions menu option, you can also:

- View a list of all unresolved customer action issues for your company
- View the ID of the user who initially entered the customer action issue, as well as the ID of the user assigned to the customer action issue when it was created, or the most recent user to work with this customer action issue
- Scan for an action issue by reason code, status and date
- Advance to the Scan Orders by Customer screen (*Order Inq*)
- Advance to *Order Inquiry Scan Screen*
- Select another company
- Customer action issues that have been resolved do not display on this screen.
- You cannot create a note for a new customer action issue at this screen. Use the *Edit Customer Actions Window* to create a customer action note.

- You can print a report listing customer action notes by date or by the person who entered them. See *Printing the Customer Exposure Report (PCER)*.

In this topic:

- *Work with Customer Action Notes Screen*
- *Change Customer Action Screen*
- *Resolving or Deleting an Action Issue*
- *Customer Action Note Details Screen*

For more information: See *About Customer Action Notes*.

Work with Customer Action Notes Screen

How to display this screen: Enter *WCAN* in the Fast path field at the top of any menu or select Work with Customer Action Notes from a menu.

Field	Description
Rn (Reason Code)	The code representing the reason for the customer action issue. See *Working with Customer Action Reason Codes (WCAR)*. Alphanumeric, 2 positions; optional.
S (Status)	The status of the customer action issue. Valid values: • *Open* • *Work in Process* • *Resolved* Optional.
Entry date	The date the customer action issue was entered. Numeric, 6 positions; optional.
Customer #	A number which identifies the customer. Numeric, 9 positions; display-only.
Ent user (Entered user)	The user who initially entered the customer action issue Alphanumeric, 10 positions; display-only.
Worked on user	The user who has most recently worked on the customer action issue. This field automatically updates when a user selects *Work in process* to update the status of an issue and enter details of its investigation; if the status of an issue has not been updated, this field displays the ID of the user initially assigned to investigate the issue. Alphanumeric, 10 positions; display-only.
Worked on date	The most recent date that the issue was investigated and "work in process" details were entered. This field automatically updates when a user selects *Work in process* to update the status of the issue and enter details of its investigation. If no action has been taken on the issue, its status remains *O* (open) and this field is blank. Numeric, 6 positions; display-only.
Dtl (Details)	The code indicating whether detail notes have been entered for this issue. *D* indicates detail notes have been entered; otherwise, the field remains blank. Alphanumeric; 1 position; display-only.

Field	Description
Description (Unlabeled field)	A brief description of the customer action issue. Alphanumeric, 40 positions; display-only.

Screen Option	Procedure
Change a customer action note	Select *Change* for a customer action note to advance to the *Change Customer Action Screen*.
Delete a customer action note	Select *Delete* for a customer action note to delete it. See *Resolving or Deleting an Action Issue*.
Display a customer action note	Select *Display* for a customer action note to advance to the Display Customer Action screen. You cannot change any information on this screen. See the *Change Customer Action Screen* for more information.
Enter detailed notes for a customer action issue	Select *Detail notes* for a customer action note to advance to the *Customer Action Note Details Screen*, where you can enter details of the action issue. This option will not update the status of the issue.
Update the status of a customer action issue to indicate that the issue has been investigated but not yet resolved	Select *Work in process* for a customer action note to advance to the *Customer Action Note Details Screen*, where you can detail any actions that have been taken on the customer issue. This option automatically updates the Status and Worked on user fields of the issue.
Resolve the issue	Select *Resolve* for a customer action note to resolve the issue and clear it from this screen.
Advance to the Scan Orders by Customer screen	Select *Order Inq* for a customer action note to advance to the Scan Orders by Customer screen. See *Using the Order Inquiry Scan Screens (OIOM)*.
Advance to the standard Order Inquiry screen	Select *Order Inquiry* to advance to the *Order Inquiry Scan Screen*.

Change Customer Action Screen

Purpose: Use this screen to change the description of the action issue, the reason code, and the user assigned to follow up on the issue.

> **Note:**
>
> You can also change a customer action note at the *Edit Customer Actions Window* by entering over the previous entries.

How to display this screen: Select *Change* for a customer action issue at the *Work with Customer Action Notes Screen*.

> **Note:**
>
> If you do not have authority to the *Change Customer Action Notes Description (A93)* secured feature, you cannot change the description of an action note on the *Edit Customer Actions Window*, and when you try to advance to the *Change Customer Action Screen* from the *Work with Customer Action Notes Screen*, the system displays a message:

Not authorized to change

Field	Description
Customer (Sold-to customer number)	A number assigned by the system to identify the customer. Numeric, 9 positions; display-only, assigned by the system.
Customer name (Unlabeled field to the right of the customer field)	The customer's last name, first name and middle initial. Last name: alphanumeric, 25 positions; display-only. First name: alphanumeric, 15 positions; display-only. Initial: alphanumeric, 1 position; display-only.
Action	A brief sentence describing the customer action issue. Alphanumeric, 40 positions.
Status	The current status of the customer action issue. Valid values are: • *Open* = this is a new issue. • *Work in Process* = the issue has been investigated but not yet resolved. • *Resolved* = the issue has been investigated and closed using *Resolve*. Display-only, updated by the system.
For user	The user ID of the person who should follow up on or resolve the action issue. Alphanumeric, 10 positions.
Reason	The reason code and description behind the customer action note. Reason code: alphanumeric, 2 positions. Reason description: alphanumeric, 30 positions; display-only.
Entered	The date the customer action issue was entered. This field defaults to the current date when you create the customer action note. Numeric, 6 positions (in user date format); display-only.
Entered user name (Unlabeled field next to the Entered field)	The user ID and name of the person who entered the action issue. User ID: alphanumeric, 10 positions; display-only. User name: alphanumeric, 30 positions; display-only.
Resolved (Date resolved)	The date the customer action issue was resolved. This field defaults to the current date when you use option 23 to resolve the issue. Numeric, 6 positions (in user date format); display-only.
Resolved user name (Unlabeled field next to the Resolved field)	The user ID and name of the person who resolved the action issue. User ID: alphanumeric, 10 positions; display-only. User name: alphanumeric, 30 positions; display-only.

How to use this screen: To change the action description, the user, or the reason code, enter over the information already entered in these fields to return to the *Work with Customer Action Notes Screen*.

Resolving or Deleting an Action Issue

Purpose: There are two ways to close a customer action issue at the *Edit Customer Actions Window*: deleting it or resolving it.

> **Note:**
>
> Similarly, you can also resolve or delete a customer action issue at the *Work with Customer Action Notes Screen*.

To delete: Select *Delete* for the issue you want to delete.

> **Note:**
>
> The action issue is deleted immediately from the screen; there is no Confirm Delete pop-up window.

The deleted issue no longer displays automatically for the customer.

To resolve: Select *Resolve* for the issue you want to identify as "resolved."

The resolved issue will no longer display on the *Work with Customer Action Notes Screen*; however, a resolved issue will continue to appear on the *Edit Customer Actions Window* in a status of resolved until it is deleted. This may be useful if, for example, the action has been resolved but you still need to notify the customer.

Optionally, you can select *Detail notes* for a resolved issue to advance to the *Customer Action Note Details Screen*, where you can enter notes about how you resolved the issue.

> **Note:**
>
> If you do not have authority to the *Delete Customer Action Notes (A96)* secured feature, a message indicates when you try to delete a customer action issue: Not authorized to delete. If you do not have authority to the *Change Customer Action Notes Status/Resolve (A98)* secured feature, a message indicates when you try to resolve a customer action issue: Not authorized to this option.

Customer Action Note Details Screen

Purpose: Use this screen to add additional information about a customer action issue. The comments you enter on this screen are attached to the short description of the customer issue that appears on the *Edit Customer Actions Window*. You can also use this screen to enter information about what steps you have taken toward resolving the issue, and to update the status from *O* (open) to *W* (work in process).

How to display this screen: Select *Detail notes* for an action issue at the *Edit Customer Actions Window* and the *Work with Customer Action Notes Screen*. You can also display this screen by selecting *Work in process* for an action issue; in this situation, the status of the issue changes from *O* (open) to *W* (work in process).

User override: If you are not the assigned user, the Confirm User Override pop-up window opens. Select *Accept* at this window to advance to the *Customer Action Note Details Screen*. The status of the customer action issue will automatically change from *O* (open) to *W* (work in process), indicating that the issue has been investigated, and the user ID will automatically update to the current user.

Field	Description
Customer# (Sold-to customer number)	A number assigned by the system to identify the customer. Numeric, 9 positions; display-only, assigned by the system.
Status	The current status of the customer action issue. Valid values are: • *Open* = this is a new issue. • *Work in Process* = the issue is being worked on. • *Resolved* = the issue has been investigated and closed. Display-only.
Entry date	The date the customer action issue was entered. This field defaults to the current date when the issue is entered. Numeric, 6 positions (in user date format); display-only.
User	The user ID of the person who entered the action issue. This is not necessarily the same as the user assigned to follow up on the issue, or the most recent user to work on the issue. Alphanumeric, 10 positions.
Description	A short description of the customer action issue, which was entered on the Edit Customer Actions screen. Alphanumeric, 40 positions
Note	Entry fields for you to enter as much information as necessary to fully describe the customer action issue. If you need extra space, use *Scroll* or *Page Down* to display more entry fields. The notes you enter on this screen are attached to the short description of the customer action issue. Alphanumeric, 60 positions per line.

About this screen: Enter as much information as necessary to fully describe the customer action issue. If you need additional space, press *Scroll* or *Page Down* to display extra entry fields. Select *OK* when you are through entering notes.

If you do not have authority to the *Add Customer Action Detail Notes (A94)* secured feature, you cannot add extra lines of detail notes to this screen. If you do not have authority to the *Change Customer Action Detail Notes (A95)* secured feature, you cannot change the notes already entered; the notes are display-only.

Process Address Changes Screen (PACS)

Purpose: Use this screen to process address changes when the ACS Tape or the MBS Tape tables are already loaded with address change information.

For more information: See *Process Address Changes Screen (PACS)* for background.

How to display this screen: Enter *PACS* in the Fast path field at the top of any menu, or select Process Address Changes from a menu.

Field	Description
Process deliverable addresses only	Indicates whether to process only those names and addresses identified as deliverable. Valid values are: • *Selected* = Process only deliverable addresses • *Unselected* = (default): Process all received records, including those identified as undeliverable. When processing the records for non-deliverable addresses, the system updates the values in the Mail and Rent fields to *unselected*. This ensures that you do not send any more catalogs to this address or sell the customer's name to another company.
Change date	The date when the address changes become effective. The system compares this date against the change date in the Customer Sold To table. If the change date you specify here is: • later than the change date in the Sold To Customer table: the system applies the name and address change • earlier than the change date in the Customer Sold To table: the system does not apply the name and address change; instead, the system creates a record in the MBS Address Change table for you to review. Use the *Work with Unchanged Customers Screen (MBSF)*. Numeric, 6 positions (in user date format); required.
Input file type	Indicates where the address changes are located. Valid values are: • *ACS* = The system checks the ACS Tape table for address changes. • *MBS* = The system checks the MBS Tape table. Alphanumeric, 3 positions; required.

Completing this screen: Complete each field as indicated above and select *Submit* to submit address updates. See *Process Overview* for more information.

MBS and ACS Table Formats

Purpose: This table describes the format of the MBS and ACS Tape tables. The *Process Address Changes Screen (PACS)* and *MBS and ACS Table Formats* require tables in one of the formats described below.

	MBS Tape table (CSMBST)		ACS Tape table (CSACST)		
Field	**Position (From-To)**	**Length**	**Position (From-To)**	**Length**	**Valid values**
Customer #			17-25	9	

	MBS Tape table (CSMBST)		ACS Tape table (CSACST)		
Field	**Position (From-To)**	**Length**	**Position (From-To)**	**Length**	**Valid values**
First name	1-20	20	64-78	15	If the ACS move type (position 39) is set to *B* (business), then positions 44-87 are not parsed into name components, but are treated as a single 41-character business name field.
Last name	21-40	20	44-63	20	
Prefix code	41	1	79-81	3	The MBS format uses a single-position code, whereas the ACS format uses the literal value. • *1* = MR • *2* = MRS • *3* = MIS • *4* = DR • *5* = REV • *6* = SR • *7* = MS • *8* = FR • *9* = CO • *** = MR & MRS • *&* = DR & MRS
Suffix code	42	1	85-87	3	The MBS format uses a single-position code, whereas the ACS format uses the literal value. • *A* = JR • *B* = SR • *C* = MD • *D* = DDS • *E* = II • *F* = III
Address 1	43-72	30	118-177	60	The components of the ACS old address field are parsed as follows: Field/Position/Size Primary No./118-127/10 Pre-directional/128-129/2 • Street name/130-157/28 • Street suffix/158-161/4 • Post-directional/162-163/2 • Unit designator/164-167/4 • Secondary no./168-177/10 • If the literal *APT*, *#*, *SUITE*, *STE*, or *UNIT* displays after the street address, the system moves this information from Address line 1 to the Apartment field, retaining the literal and any text that follows it. *Example:* If the street address is `123 MAIN ST SUITE`

	MBS Tape table (CSMBST)		ACS Tape table (CSACST)		
Field	**Position (From-To)**	**Length**	**Position (From-To)**	**Length**	**Valid values**
Address 2	73-102	30			`15`, the street address is `123 MAIN ST` and the apartment is `SUITE 15`.
City	103-122	20	178-205	28	The first 20 positions of the ACS city maps to the MBS city code.
Filler	123-127	5			
State	128-129	2	206-207	2	
Zip	130-134	5	208-212	5	
Zip+4	135-138	4			ACS does not provide old ZIP+4.
Filler	139-150	12			
Dwelling code	151	1	40	1	Valid MBS codes: • *U* = Unknown • *S* = Single • *B* = Business • *A* = Multi with Apartment • *M* = Multi, with no Apartment. The ACS record does not have a matching field, but a code may derive from the ACS Move type. Valid move types: • *F* = Family move (equals *U* in MBS layout) • *I* = Individual move (equals *U* in MBS layout) • *B* = Business (equals *B* in MBS layout)
Filler	152-158	7			
Priority	159-161	3			No matching ACS field.
Key	162-169	8			No matching ACS field.
Multi-buyer Code	170	1			No matching ACS field.
Filler	171-185	15			
Zip Level	186-188	3			No matching ACS field.
Carrier Route	191-194	4			No matching ACS field.
NCOA Indicator	195	1	37	1	• *F* = Family Move • *I* = Individual Move • *B* = Business (ACS code) If *F* or *I*, new address at position 491
Filler	196-198	3			

	MBS Tape table (CSMBST)		ACS Tape table (CSACST)		
Field	**Position (From-To)**	**Length**	**Position (From-To)**	**Length**	**Valid values**
Zap Indicator	199	1	1	1	Valid MBS codes: • *X* = Undeliverable • *Z* = Zip Change If *Z*, new zip at position 130 If ACS position 38 is set to one of the following values, then this is a “Nixie” record (undeliverable) and the MBS Zap indicator are loaded with a value of *X*: • *A* = attempted, not known • *B* = returned for better address • *C* = not deliverable as addressed • *D* = outside delivery limits • *E* = in dispute • *G* = PO box closed • *I* = insufficient address • *K* = moved, left no address • *L* = illegible • *M* = no mail receptacle • *N* = no such number • *P* = returned for postage • *Q* = not deliverable as addressed • *R* = refused • *S* = no such street • *U* = unclaimed • *V* = vacant • *W* = temporarily away • *X* = no such office The MBS table will not contain COA records reflecting changes only to the ZIP code. A postal customer would not submit a COA form if the zip code changed but he/she did not move, so there would be no COA request to trigger a record in this table. *Note:* The first record on the ACS Tape table has an *H* in this field, indicating that this is a header record and should not be used.
Tier Code	200	1			No matching ACS field.
Filler	201-233	33			
Old Zip Code	234-238	5	208-212	5	

	MBS Tape table (CSMBST)		ACS Tape table (CSACST)		
Field	**Position (From-To)**	**Length**	**Position (From-To)**	**Length**	**Valid values**
NCOA Move Date	239-242	4	33-36	4	
Filler	243-275	33			
DT Dwelling Code	276	1			No matching ACS field.
Old DMT Dwelling Code	277	1			No matching ACS field.
Old Finalist Dwelling Code	278	1			No matching ACS field.
Filler	279-364	86			
Address Reverse Indicator	365	1			No matching ACS field.
Filler	366-381	16			
String	382-383	2			No matching ACS field.
Standard Addr1	384-413	30			No matching ACS field.
Standard Addr2	414-443	30			No matching ACS field.
Standard City	444-456	13			No matching ACS field.
Standard State	457-458	2			No matching ACS field.
Filler	459-478	20			
Delivery Point Barcode	479-481	3	342-344	3	
Filler	482-490	9			
New Addr1	491-520	30	244-303	60	The components of the ACS new address field are parsed as follows: Field/Position/Size Primary No./244-253/10 Pre-directional/254-255/2 Street name/256-283/28 Street suffix/284-287/4 Post-directional/288-289/2 Unit designator/290-293/4

	MBS Tape table (CSMBST)		ACS Tape table (CSACST)		
Field	**Position (From-To)**	**Length**	**Position (From-To)**	**Length**	**Valid values**
New Addr2	521-550	30			Secondary no./294-303/10
New City	551-565	15	304-328	25	
New State	566-567	2	332-333	2	
New 9-digit Zip	568-576	9	334-343	10	
New Carrier Route	577-580	4			No matching ACS field.
Move Type	581	1	39	1	• *I* = Individual Move • *F* = Family Move • *C* = Company Move • *B* = Business Move
Undeliverable Type	582	1	38	1	• *C* = Not Deliverable • *G* = Box Closed • *K* = Moved, Left No Address • *F* = Moved to Foreign Address • *Z* = Invalid Postal Record • *F* = Moved to foreign address If *' '*, zip code or address change If ACS position 38 is set to one of the following values, then this is a “Nixie” record (undeliverable), and the MBS Zap indicator will be loaded with a value of *X*: • *A* = attempted, not known • *B* = returned for better address • *C* = not deliverable as addressed • *D* = outside delivery limits • *E* = in dispute • *G* = PO box closed

	MBS Tape table (CSMBST)		ACS Tape table (CSACST)		
Field	**Position (From-To)**	**Length**	**Position (From-To)**	**Length**	**Valid values**
					• *I* = insufficient address • *K* = moved, left no address • *L* = illegible • *M* = no mail receptacle • *N* = no such number • *P* = returned for postage • *Q* = not deliverable as addressed • *R* = refused • *S* = no such street • *U* = unclaimed • *V* = vacant • *W* = temporarily away • *X* = no such office
Filler	583-592				
Customer code	593-601	9	17-25	9	
	602-772				Not used by Order Administration.

Work with Changed Customers Screen (MBSI)

Purpose: Use this screen to review the customer's name and address before and after the address updates. You can also use this screen to delete a change, purge all name and address changes or print a list of changes.

The system creates these updates after you use the *MBS and ACS Table Formats* or the *Work with Changed Customers Screen (MBSI)*.

You can review name and address updates that did not take effect through the *Work with Unchanged Customers Screen (MBSF)*. Customers may be unchanged because the updates were not processed, the customer was not found, the customer has open orders, or the change date for the customer was later than the change date on the received file.

For more information: See *Work with Changed Customers Screen (MBSI)* for background.

How to display this screen: Enter *MBSI* in the Fast path field at the top of any menu or select the Work with MBS Before and After Images option from the menu.

Field	Description
Customer #	A number to identify a customer. The customer record must exist on the system for any address updates to be performed. Numeric, 9 positions; display-only, assigned by the system.
Customer name	The customer's name. Alphanumeric, 25 positions; display-only.

Field	Description
City	The city where the customer lived before the address update (if the address update resulted from a move). Alphanumeric, 25 positions; display-only.
State	The code for the state or province where the customer lived before the address update (if the address update resulted from a move). Alphanumeric, 2 positions; display-only.

Screen Option	Procedure
Remove a record from the screen	Select *Delete* for a record to delete it. **Note:** This does not undo the address update; it simply purges the record from the MBS Changed Customers table.
Review the address before and after the update	Select *Display* for a record to advance to the *Display Changed Customers Screen (Reviewing the Address Before and After the Update)*.
Purge all address updates from the MBS Changed Customers table	Select *Purge*. **Note:** To maintain job performance, you should backup and purge this table prior to loading any new address updates.
Print a report listing the customer addresses before and after the update	Select *Print* to print the *Changed Customers Report*.

Display Changed Customers Screen (Reviewing the Address Before and After the Update)

Purpose: Use this screen to review the changes to a customer's name and address before and after the update.

How to display this screen: Select *Display* for a customer number at the *Work with Changed Customers Screen (MBSI)*.

The BEFORE information represents the customer's name and address prior to the update. The AFTER information represents the customer's current name and address, resulting from the update.

Field	Description
Customer #	A number to identify a customer. The customer record must exist on the system for any address updates to be performed. Numeric, 9 positions; display-only, assigned by the system.
PO box?	Indicates whether the address is a post office box. Valid values are: • *selected* = PO box. • *unselected* = Not a PO box.
Delivery code	Indicates whether the address is a *business* or *residence*. This information is used by shippers who charge different rates for shipping a package to a business or home. Display-only, updated by the system.
Address	The customer's old and new addresses.

Work with Unchanged Customers Screen (MBSF)

Purpose: Use this option to:

- review the unprocessed records in the MBS Work table
- remove a record from the table
- review the type of name and address change
- purge all records in the table
- process the records in the table

For more information: See Loading Address Updates for background.

Selecting this option: Enter MBSF in theFast path field at the top of any menu or select the Work with MBS Address Change File option from the menu.

Field	Description
Customer #	A number to identify a customer. The customer record must exist on the system for any address updates to be performed. Numeric, 9 positions; display-only, assigned by the system.
Change status	The status of the record, which may indicate reason that the customer name and address was not updated. Valid values are: • Not Processed • Open Orders Exist • Last Change Date Greater Than • Customer Does Not Exist
Change type	Identifies the reason for the name and address change. • Valid values are: • Zip Code Change • Family Move • Individual Move *Display-only, updated by the system.*

Field	Description
Deliverable address	Indicates whether the address is a valid, deliverable address. Valid values are: • **YES** • **NO** If NO, the system changes the values in the Mail and Rent fields in the Sold To Customer table to unselected so that you do not send any more catalogs to the customer or sell the customer's address to other companies. *Display-only, updated by the system.*

Screen Options	Procedures
Update the status of a record to Not Processed	Select Reset for a record to update its status to Not Processed.
Remove a record from the work table	Select Delete for a record to delete it.
Review the change	Select Display for a record to display the Work with Customer Changes Screen (Reviewing Unapplied Address Changes).
Purge all records in the work table after you process or review them	Select Purge.
Process the updates	Select Process.
Print a report of the unchanged customers that identifies the customer number, change condition, change type, whether it is a deliverable address, the address, the delivery code, and whether the address is a P.O. box	Select Print to print the Unchanged Customers Report

Work with Customer Changes Screen (Reviewing Unapplied Address Changes)

Purpose: Use this screen to review an unapplied address change.
How to display this screen: Select Display for a customer number at the Work with Unchanged Customers Screen (MBSF).

Field	Description
Customer #	A number to identify a customer. The customer record must exist on the system for any address updates to be performed. Numeric, 9 positions; display-only, assigned by the system.

Field	Description
Change status	The status of the record, which may indicate the reason that the customer address was not updated. Valid values are: • Not Processed • Open Orders Exist • Last Change Date Greater Than • Customer Does Not Exist Alphanumeric, 25 positions; display-only, updated by the system.
Change type	Identifies the reason for the change. Valid values are: • Zip Code Change • Family Move • Individual Move Alphanumeric, 15 positions; display-only, updated by the system.
Deliverable	Indicates whether the address is a valid, deliverable address. Valid values are: • **YES** • **NO** If NO, the system changes the values in the Mail and Rent fields in the Sold To Customer table to unselected so that you do not send any more catalogs to the customer or sell the customer's address to other companies. Alphanumeric, 3 positions; display-only, updated by the system.
PO box?	Indicates whether the address is a post office box. Valid values are: • selected = PO box. • unselected = Not a PO box.
Delivery code	Indicates whether the address is a business or residence. This information is used by shippers who charge different rates for shipping a package to a business or home. Display-only, updated by the system.
Address	The customer's address BEFORE the address update.

Process Changes Screen

Purpose: Use this screen to process name and address updates.
How to display this screen: Select Process at the Work with Unchanged Customers Screen (MBSF).

Field	Description
Change Date	The date when the changes become effective. The system compares this date against the change date in the Customer Sold To table. If the change date for the received record is later than the change date in the Sold To Customer table, the system applies the address change. If the change date for the received record is earlier than the change date in the Customer Sold To table, the system does not apply the address change; instead, the system creates a record in the MBS Address Change table for you to review. Numeric, 6 positions (in user date format); required.
Source of Update	Indicates the table from which the system uploads changes. Valid values are: • ACS = The USPS ACS (address change service) format. The system converts the ACS table to MBS format to process the information. • MBS = The MBS format. Alphanumeric, 4 positions; required.

7 Fulfillment

Reserving Inventory and Generating Pick Slips

Topics in this part:

- Reviewing Reservation Types describes the three types of reservations: Immediate, Batch, and Interactive.
- Reviewing Other Reservation Conditions discusses other reservation conditions, such as: Coordinate grouping, drop ship reservations, special handling reservations, and reserving inventory for sets and variable sets.
- Working with Interactive Reservation (MIRV) discusses creating, changing, deleting, and displaying order information using this reservation type.
- Preparing Orders for Pick Slip Generation provides an overview on preparing an order for pick slip generation.
- Performing Pick Slip Generation includes locating the pick slip generation function, printing pick slips, performing cubing, selecting pick locations, replenishing stock, and using cart/bin picking.
- Selecting Vendors for Drop Ship Processing (MDSP) includes creating, changing, deleting, and displaying vendors for drop ship processing.
- Displaying Pick Slip Generation Inquiry (DPSI) describes this management tool.
- Working with Pick Slip Messages (WPSM) describes creating, changing, deleting, and displaying pick slip messages.
- Processing Drop Ship Orders by Batch (MDSB) describes how to generate drop ship picks by batch for selected vendors.
- Printing the Carryover Report (PCOR) describes how to generate the Carryover reports.
- Generic Pick Out API describes how to generate the outbound pick slip message for integration with another system.
- Pick Message from Order Administration (CWPickOut) describes the Pick Message from the Order Administration.
  For more information see the Order Administration Web Services Guide on https://support.oracle.com My Oracle Support (ID 2953017.1).
- Streamlined Pick Slip Generation (WSPS) describes a streamlined version of the pick slip generation option.

- Pick Print Eligibility (WPPE) determines whether the system will include picks for a specified order in the next pick slip generation run for the selected pick slip generation template.
- Unlock Pick Slip (MUPI) allows you to unlock a pick slip.

Working with Interactive Reservation (MIRV)

Purpose: Use this option to reserve stock for specific orders, customer classes, or items via an interactive entry program. You can use interactive reservation in conjunction with Immediate Reservation. Interactive reservation enables you to selectively distribute stock over many orders, or to manually select preferred customers to receive inventory.

You can also use the interactive reservation program to reserve any backordered zone-reservation-coded items not reserved through the zone reservation process. Zone-reservation-coded items are excluded from normal backorder processing.

Quotes: Inventory on quotes is not eligible for interactive reservation; see Entering Pre-Order Quotes for an overview and required setup.

In this topic:

- Scanning for Orders
- Interactive Reservation Screen
- Work with Order Detail Reservations Screen
  - Display Order Detail Reserve Information Screen
  - Work with Reservations by Warehouse Screen
  - Display On Hand by Warehouse Screen
  - Display Item Warehouse Screen (Displaying Item Warehouse Details)
  - Display Reserved Order Lines Screen
- Scan Orders by Customer Class Screen
- Work with Reservations by Item/SKU Screen

Scanning for Orders

Use the Interactive Reservation Screen to select an order number, customer class, or item/SKU for reservation.

- Order numbers are unique numbers assigned by the system to identify an order.
- Customer class codes are used to restrict certain customers who order in large quantities from immediate reservation in order entry.
- Item/SKU codes represent units of inventory.

When you enter information in any of these fields, you advance to the next screen based on the first field that has an entry. For example, if you enter an order number and a customer class, you first advance to the Work with Order Detail Reservations Screen, and then to the Scan Orders by Customer Class Screen.

Pick slip preparation: The system removes any pick slip preparation from an order when you:

- scan by order number.

- scan by customer class and select an order.
- scan by item/SKU and perform an action against an item on the order.

When you exit Interactive Reservation, the system determines if the order qualifies for pick slip preparation, and if so, applies it to the order. See Preparing Orders for Pick Slip Generation.

Interactive Reservation Screen

How to display this screen: Enter MIRV in the *Fast path* field at the top of any menu or select Interactive Reservation from a menu.

Field	Description
Order #	A unique number assigned by the system to identify an order. Enter a valid order number to advance to the Work with Order Detail Reservations Screen. If you enter an invalid order number, you advance to the Scan by Order Number screen. Inventory on quotes is not eligible for interactive reservation: `Quotes cannot be reserved`. *Numeric, 8 positions; optional.*
Customer class	A code to identify a group of customers. You can direct offers to specific classes of customers or generate lists by customer class code. Enter a valid code to advance to the Scan Orders by Customer Class Screen. Customer class codes are defined in and validated against the Customer Class table; see Setting Up the Customer Class Table (WCCL). *Alphanumeric, 2 positions; optional.*
Item/SKU	The code that represents the item/SKU. Enter a valid code (both item and SKU) to advance to the Work with Reservations by Item/SKU Screen. *Item: alphanumeric, 12 positions; optional.* *SKU: alphanumeric, three 4-position fields; optional.*

Work with Order Detail Reservations Screen

Purpose: Use this screen to select items for review, or to work with reservations by warehouse.

How to display this screen: Complete the Order # field on the Interactive Reservation Screen.

Field	Description
Shp (Ship to number)	A system-assigned number that represents the number of shipping addresses for the order. *Numeric, 3 positions; display-only.*
Ln# (Line number)	A system-assigned detail line number on the order. *Numeric, 3 positions; display-only.*
Item	A code used to identify a unit of inventory. *Alphanumeric, 12 positions; display-only.*

Field	Description
COLR SIZE OTHR	A code used to further define the item. *Alphanumeric, three 4-position fields; display-only.*
Qty avail	The quantity of the item that is available to sell in this warehouse. A negative number indicates the item is backordered. The calculation for availability is: `On hand quantity - Quantity reserved - Quantity protected - Pending transfers - Backordered quantity` Takes into account only reservable locations. *Numeric, 7 positions; display-only.*
Qty prot (Quantity protected)	The quantity of the item that can be reserved only through Interactive Reservation where inventory is dispersed manually, as in the case of large wholesale orders or preferred mail order customers. *Numeric, 5 positions; display-only.*
Qty open (Quantity open)	The total number of units that have not shipped. *Numeric, 5 positions; optional.*
Qty rsrvd (Quantity reserved)	The quantity of the item that is set aside for existing orders. Increases by immediate and interactive reservation and decreases by confirmation or pick void/reprint. *Numeric, 5 positions; optional.*
Qty to reserve	The number of units of the item that you want to reserve for this order. *Numeric, 5 positions; required.*

Screen Option	Procedure
Display order details	Select Order detail for an order detail line to advance to the Display Order Detail Reserve Information Screen.
Display reserve by warehouse details	Select Reserve by Warehouse for an order detail line to advance to the Work with Reservations by Warehouse Screen.
Display reserved order lines	Select Reserved Order Lines for an order detail line to advance to the Display Reserved Order Lines Screen.

Display Order Detail Reserve Information Screen

Purpose: Use this screen to review reservation information for an order detail line.

How to display this screen: Select Order detail for an order detail line on the Work with Order Detail Reservations Screen.

Field	Description
Order	A unique number assigned by the system to identify an order. Every order on the system is assigned an order number. *Numeric, 8 positions; display-only.*

Field	Description
Ship-to number (Unlabeled field to the right of the order number)	A hyphen (-) separates this field from the *Order #* field. Indicates the number of shipping addresses for the order. The system assigns a sequential ship-to number to every order. The first ship-to address is assigned the number 1. *Numeric, 3 positions; display-only.*
Line number (Unlabeled field to the right of the ship-to number)	A hyphen (-) separates this field from the *Ship-to* field. The line number on the order. Up to 999 detail lines may be entered on an order. Order lines are presented in descending sequence so that the most recent order line displays first. *Numeric, 3 positions; display-only.*
Status	The status of the order detail line. Valid values: • B = Express Bill • C = Canceled • E = Error • H = Held • S = Sold out • X = Closed • Blank = Open *Alphanumeric, 1 position; display-only.*
Item	A code and description of the unit of inventory on an order detail line. If a SKUed item is displayed, the SKU information will also appear. *Alphanumeric, 12 positions; display-only.*
Override warehouse	The code and description of the warehouse that supersedes the default warehouse, defined in the System Control table. *Numeric, 3 positions; display-only.*
Backorder warehouse	The code and description of the warehouse that the order detail line was backordered from. *Numeric, 3 positions; display-only.*
Backorder date	The date when the order detail line was printed on the backorder notification form. This form is sent to a customer when an order detail line is delayed in shipping. *Numeric, 6 positions; display-only.*
Backorder reason	The reason an order detail line was backordered. *Alphanumeric, 25 positions; display-only.*

Field	Description
Bypass reservation	A code which indicates whether the item is flagged to bypass reservation in order entry. • Selected = The item is flagged to bypass reservation in order entry. • Unselected = The item is not flagged to bypass reservation in order entry. **Note:** If the Use OROB for Fulfillment Assignment (M31) system control value is selected, the system uses the *Bypass reservation* flag to send orders to Order Orchestration for fulfillment assignment.
Drop ship flag	Indicates whether this item is an item that you typically do not stock in inventory; drop ship items must be ordered and shipped from your supplier (vendor). These types of items are not generally available for Reservation. The system creates a separate pre-generated pick for drop ship items to print and forward to the vendor. Additionally, drop ship items must be billed via a special drop ship billing program (because the vendor must notify you when the items have shipped so that you do not bill the customer before the merchandise is received). Valid values: • Drop Ship = Drop ship item • Regular = Regular item *Display-only.*

Field	Description
Future order	Valid values: • Selected = Indicates that this is a future order. • Unselected = Indicates that this is a current order. How the system evaluates future orders: 1) The system adds today's date and the Reservation Lead Days (B27) and compares this value against the Arrival date on the order. If the result is greater than the Arrival Date, the system: • Considers the order to be a future order and inventory will not be reserved. • Flags each detail line on a future order for future reservation. 2) Typically, you run the Evaluate Future Orders program each evening to evaluate each order detail line marked as a “future order.” The system adds today's date to the Reservation Lead Days value and compares the result against the order's Arrival Date. This comparison determines when inventory can be reserved for a future order. When the result is less than or equal to the Arrival Date, the “future order” flag will be removed from each detail line on the order and each line will be eligible for reservation.
Expected ship date	The date on which a purchase order that can fulfill this order line is expected. This date takes into account PO layering, where previously-backordered items will be fulfilled from new PO receipts, prior to new backordered lines. This means that the next purchase order due to be received may not be the purchase order to fulfill this line. *Numeric, 6 positions (in user date format); display-only.*
Reserve date/time	The date and time that inventory was matched to this order detail line. *Numeric, 6 positions (in user date format, HHMMSS format); display-only.*
Ordered	The number of units of this item on the order detail line. *Numeric, 5 positions; display-only.*
Reserved	The number of units of the item reserved during the Reservation program. This program reserves stock for specific orders. Quantities may or may not have picks created for them. *Numeric, 5 positions; display-only.*
Printed	The number of units of the item, on this order detail line, for which pick slips have been printed. *Numeric, 5 positions; display-only.*
Shipped	The quantity on this order detail line that has been shipped. *Numeric, 5 positions; display-only.*
Canceled	The quantity on this order detail line that has been canceled. *Numeric, 5 positions; display-only.*
Returned	The quantity on this order detail line that has been returned. *Numeric, 5 positions; display-only.*

Field	Description
Sold out	The quantity on this order detail line that has been sold out. *Numeric, 5 positions; display-only.*

Work with Reservations by Warehouse Screen

Purpose: Use this screen to review reservation information by warehouse. This information is listed according to the item's quantity available to sell, the item's quantity that cannot be reserved except through interactive reservation, and the number of units of this item that will be reserved.

How to display this screen: Select Reserve by Warehouse for a detail line on the Work with Order Detail Reservations Screen.

Field	Description
Order	A unique number assigned by the system to identify an order. Every order on the system is assigned an order number. *Numeric, 8 positions; display-only.*
Ship-to number (Unlabeled field to the right of the order number)	A hyphen (-) separates this field from the *Order #* field. Indicates the number of shipping addresses for the order. The system assigns a sequential ship-to number to every order. The first ship-to address is assigned the number **1**. *Numeric, 3 positions; display-only.*
Line number (Unlabeled field to the right of the ship-to number)	A hyphen (-) separates this field from the *Ship-to* number. The line number on the order. Up to 999 detail lines may be entered on an order. Order lines are presented in descending sequence so that the most recent order line displays first. *Numeric, 3 positions; display-only.*
Qty open (Quantity open)	The total number of units that have not been shipped. This includes quantity on backorder and quantity held. Future shipments and drop ships are not included in this number. *Numeric, 5 positions; display-only.*
Qty rsrved (Quantity reserved)	The quantity of the item that is set aside for existing orders. Increases by immediate and interactive reservation and decreases by confirmation or pick void/reprint. *Numeric, 5 positions; display-only.*
Sold to	The name of the customer who placed the order. Validated against the Customer Sold-to table. *Alphanumeric, 15 positions (first name), 1 position (initial), 25 positions (last name); display-only.*
Item	A code and description of the unit of inventory on an order detail line. If a SKUed item is displayed, the SKU information will also appear. Validated against the Item table. *Alphanumeric, 12 positions; display-only.*
Whs (Warehouse)	A code that represents the default warehouse. Warehouse codes are defined in and validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS). *Numeric, 3 positions; optional.*

Field	Description
Warehouse name	A description of the default warehouse. *Alphanumeric, 12 positions; display-only.*
Quantity available	The quantity of the item that is available to sell. A negative number indicates the item is backordered. *Numeric, 7 positions; display-only.*
Quantity protected	The quantity of the item that can be reserved only through Interactive Reservation where inventory is dispersed manually, as in the case of large wholesale orders or preferred mail order customers. *Numeric, 5 positions; display-only.*
Qty to reserve (Quantity to reserve)	The number of units of this item to reserve for this order. *Numeric, 5 positions; required.*

Screen Option	Procedure
Display locations	Select Display Locs for a warehouse to advance to the Display On Hand by Warehouse Screen.
Review warehouse details	Select Warehouse details for a warehouse to advance to the Display Item Warehouse Screen (Displaying Item Warehouse Details)
Review order details	Select Order Detail to advance to the Display Order Detail Reserve Information Screen.
Review reserved lines	Select Reserved Lines to advance to the Display Reserved Order Lines Screen.

Display On Hand by Warehouse Screen

Purpose: This screen displays on-hand inventory for items in a particular warehouse location.

How to display this screen: At the Work with Reservations by Warehouse Screen, select Display Locs for the warehouse you want to view.

Field	Description
Warehouse	A code that represents the default warehouse. *Numeric, 3 positions; display-only.*
Item	A code and description of the unit of inventory on the order detail line. If a SKUed item is displayed, the SKU information will also appear. *Item: alphanumeric, 12 positions; display-only.* *SKU: alphanumeric, three 4-position fields; display-only.* *Description: Alphanumeric, 30 positions, display-only.*

Field	Description
Location	A user-defined code that represents a warehouse location where merchandise is stored. The warehouse location code can consists of a zone/aisle/shelf/bin combination, or it can be any user-defined code. The location code prints on picks slips and reports. Example: The location A010201 indicates: `Zone Aisle Shelf Bin` `A 01 02 01` See Creating and Maintaining Locations (WLOC). *Alphanumeric, 7 positions; display-only.*
On hand	The actual on-hand quantity for the item in this warehouse location. *Numeric, 7 positions; display-only.*
Printed	The number of units currently “allocated” for this item in this warehouse location, determined by the number of picks generated for this location. When determining locations to reserve during Reservation, the system subtracts the printed quantity from the on-hand quantity in this location to determine the quantity available for Reservation. *Numeric, 7 positions; display-only.*

Display Item Warehouse Screen (Displaying Item Warehouse Details)

Purpose: This screen displays detail information for items in a specified Item/SKU Warehouse.

How to display this screen: At the Work with Reservations by Warehouse Screen, select Warehouse details for the warehouse you want to view. All fields on this screen are display-only.

Field	Description
Item	The item code. *Alphanumeric, 12 positions; display-only.*
SKU	A code that further identifies the item. *Alphanumeric, three 4-position fields; display-only.*
Warehouse	The code and description of the default warehouse. *Numeric, 3 positions; display-only.*
Reservation freeze	Indicates whether the item or SKU in this warehouse is frozen. Valid values are: • Selected = The item/SKU warehouse is frozen. • Unselected = The item/SKU warehouse is not frozen. If an item or SKU warehouse is frozen: • Pick Slip Generation will ignore the item warehouse when determining where inventory should be picked to fulfill an order. See Performing Pick Slip Generation. • Inventory will not reserve during Order Entry. See Reviewing Reservation Types.

Field	Description
Economic order qty	The optimum ordering quantity for this item/SKU, based on a set of criteria such as: quantity, cost, etc. Used for inventory reporting purposes and by Purchasing. *Numeric, 7 positions; display-only.*
Backorder qty	The quantity of the item needed to fill existing orders, which must be fulfilled through PO receipts. *Numeric, 7 positions; display-only.*
Protected qty	The quantity of the item that can be reserved only through Interactive Reservation where inventory is dispersed manually, as in the case of large wholesale orders or preferred mail order customers. *Numeric, 5 positions; display-only.*
Min qty	The minimum on-hand quantity for the item/SKU in this warehouse. *Numeric, 7 positions; display-only.*
Reorder qty	The quantity of the item that should be ordered when inventory reaches the minimum stock level (defined in the *Min Qty* field). *Numeric, 7 positions; display-only.*
Max qty	The maximum on-hand quantity for the item/SKU in this warehouse. *Numeric, 7 positions; display-only.*
Reserve qty	The quantity of the item/SKU that is set aside for existing orders. Increases by immediate, batch, or interactive reservation and decreases by confirmation or pick void/reprint. *Numeric, 7 positions; display-only.*
On hand qty	The actual on-hand quantity for the item in this warehouse location. *Numeric, 7 positions; display-only.*
S/H reserve qty	The quantity of this item in this warehouse that has been reserved and is undergoing some type of special handling, such as monogramming, hemming, etc. Increased by the Reservation program. Items that are flagged with a special handling code in Order Entry or Order Maintenance increment this field following reservation. Decreased by Confirmation or Pick Void/Reprint. *Numeric, 7 positions; display-only.*
On order qty	The quantity of this item due to be received in this warehouse through purchase orders. This information helps the customer decide whether to order now or to cancel the order because of inventory unavailability. *Numeric, 7 positions; display-only.*
Reserve transfer quantity	The quantity of the item that is earmarked for an inventory transfer. This quantity cannot be used by the Reservation program to match inventory to new orders. *Numeric, 7 positions; display-only.*

Field	Description
Protect min/max	This field is not currently implemented. Included only if the Use Store File (G15) system control value is selected.
Cost of goods	Represents the vendor cost at which this item in this warehouse was purchased. The cost of the item is updated when the item is confirmed for shipment. Used in item profitability analyses. **Note:** The Display Cost in Inventory (A38) secured feature controls the display of this field. *Numeric, 20 positions with a 2-place decimal; display-only.*
Picks generated	The total number of pick slips generated for this item in this warehouse, life-to-date. *Numeric, 7 positions; display-only.*
Dollars returned	The dollar value of all returns that have been entered to date for this item in this warehouse. Updated by the Return Authorization process when the return is accepted. Updated with the actual dollars returned based on the amount charged when the item was shipped. *Numeric, 20 positions with a 2-place decimal; display-only.*
Units returned	The number of units of this item in this warehouse returned to date. Updated by the Return Authorization process when returns are entered and updated. *Numeric, 7 positions; display-only.*
Dollars sold	The actual amount sold (shipped and billed) for this item/SKU to date. Updated with the actual merchandise amount billed on the shipment, during Billing. *Numeric, 20 positions with a 2-place decimal; display-only.*
Units sold	The number of sales for this item/SKU in this warehouse to date. Updated during Billing. *Numeric, 7 positions; display-only.*
Protect price	This field is not currently implemented. Included only if the Use Store File (G15) system control value is selected. An error message indicates if you try to change this value and you do not have authority to the Maintain Item Warehouse Retail Price (A91) secured feature: `Not authorized to change`.

Display Reserved Order Lines Screen

Purpose: This screen displays order line information. This information is listed according to company; warehouse; quantity reserved, quantity printed, and quantity remaining; and reservation date and time.

How to display this screen: At the Work with Reservations by Warehouse Screen, select Reserved Lines.

Field	Description
Order	A unique number assigned by the system to identify an order. Every order on the system is assigned an order number. *Numeric, 8 positions; display-only.*
Ship-to number (Unlabeled field to the right of the order number)	A hyphen (-) separates this field from the *Order #* field. Indicates the number of shipping addresses for the order. The system assigns a sequential ship-to number to every order. The first ship-to address is assigned the number 1. *Numeric, 3 positions; display-only.*
Line number (Unlabeled field to the right of the ship-to number	A hyphen (-) separates this field from the *Ship-to* field. The line number on the order. Up to 999 detail lines may be entered on an order. Order lines are presented in descending sequence so that the most recent order line displays first. *Numeric, 3 positions; display-only.*
Qty ordered	The number of units of this item ordered on this order line. *Numeric, 5 positions; display-only.*
Qty reserved	The quantity of the item/SKU that is set aside for this order. *Numeric, 7 positions; display-only.*
Cmp (Company)	The company for which you are viewing records. *Numeric, 3 positions; display-only.*
Whs (Warehouse)	A code that represents the warehouse from which the order line was reserved. Validated against the Warehouse table. *Numeric, 3 positions; display-only.*
Quantity reserved	The quantity of the item/SKU that is set aside for this order. *Numeric, 7 positions; display-only.*
Quantity printed	The number of units for which a pick slip has been printed. The system updates this field when it creates a pre-generated pick for the order line, incrementing this number by the quantity on the Pick Control Detail; see Applying Pick Slip Preparation to an Order. *Numeric, 5 positions; display-only.*
Quantity remaining	The difference between the quantity reserved and the quantity printed. The system updates this field when it creates a pre-generated pick for the order line, decreasing this number by the quantity on the Pick Control Detail; see Applying Pick Slip Preparation to an Order. Only records with a remaining quantity greater than zero will be selected. *Numeric, 5 positions; display-only.*
Reservation date	The date the item on the order detail line was reserved. *Numeric, 6 positions (in user date format); display-only.*
Reservation time	The time the item on the order detail line was reserved. *Numeric, 6 positions (HHMMSS format); display-only.*

Scan Orders by Customer Class Screen

Purpose: Use this screen to display the customer(s) that you want to work with. Customer classes restrict certain customers from immediate reservation. For example, there may be some customers who should not be included in immediate reservation due to the volume of merchandise ordered, or the type of items ordered.

How to display this screen: On the Interactive Reservation Screen, enter the customer class you wish to work with, or prompt click on the arrow in the *Customer class* field to display a list of customer classes.

Field	Description
Order #	A system-assigned code that represents a customer order number. *Numeric, 8 positions; optional.*
Order date	The order processing date. Defaults to the current date. *Numeric, 6 positions (in user date format); optional.*
Status	The status of the order detail line. Valid values: • **Open** • **Cancelled** • **Closed** • **Error** • **Held** • **Purged** • **Suspended** *Optional.*
Type	A user-defined code that indicates how the order was received, such as mail order, telephone order, retail, etc. *Alphanumeric, 1 position; optional.*

Select Work with detail for an order to advance to the Work with Order Detail Reservations Screen.

Work with Reservations by Item/SKU Screen

Purpose: Use this screen to display the order information for a particular item that you want to work with.

How to display this screen: On the Interactive Reservation Screen, enter an item/SKU, or prompt click on the arrow in this field to display a list of items and then a list of SKUs associated with an item.

Field	Description
Item	A code and description for a unit of inventory on an order detail line. If a SKUed item is displayed, the SKU information will also appear. *Alphanumeric, 12 positions; display-only.*
COLR SIZE OTHR	The SKU code; a code that further defines the item. The three elements are defined in the System Control table and validated against the SKU Element (1, 2, 3) tables. *Alphanumeric, three 4-position fields; display-only.*

Field	Description
Qty avail (Quantity available)	The quantity of the item that is available to sell in all warehouses. A negative number indicates the item is backordered. The calculation for availability is: `On hand quantity - Quantity reserved - Quantity protected - Pending transfers - Backordered quantity` Takes into account only reservable locations. *Numeric, 7 positions; display-only.*
Qty prot (Quantity protected)	The quantity of the item that can be reserved only through Interactive Reservation where inventory is dispersed manually, as in the case of large wholesale orders or preferred mail order customers. *Numeric, 5 positions; display-only.*
Order #	A unique number assigned by the system to identify an order. *Numeric, 8 positions; optional.*
Shp (Ship-to number)	This system-assigned number represents the number of shipping addresses for the order. *Numeric, 3 positions; optional.*
Ln # (Line number)	A system-assigned detail line number on the order. *Numeric, 3 positions; optional.*
Sold-to name	The name of the customer who placed the order. Validated against the Customer Sold-to table. *Alphanumeric, 15 positions (first name), 1 position (initial), 25 positions (last name); display-only.*
Qty open	The number of units of this item that have not shipped.
Qty rsrvd (Quantity reserved)	The number of units of the item that are set aside for existing orders. Increases by immediate and interactive reservation and decreases by confirmation or pick void/reprint. *Numeric, 5 positions; optional.*
Qty to reserve	The number of units of this item that are to be reserved for this order. *Numeric, 5 positions; required.*

Screen Option	Procedure
Display order detail information	Select Display order detail for an order to advance to the Display Order Detail Reserve Information Screen.
Display reservations by warehouse details information	Select Reserve by warehouse for an order to advance to the Work with Reservations by Warehouse Screen.
Display reserved order lines	Select Reserved order lines for an order to advance to the Display Reserved Order Lines Screen.

Selecting Vendors for Drop Ship Processing (MDSP)

Overview: Use Select Vendors for Drop Ship Processing to select one, several, or all vendors for processing drop ship purchase orders or picks. Each vendor code entered on the screen is validated against Working with Vendors (WVEN). If you do not select any vendors, all vendors are eligible for drop ship processing. Completing this screen automatically generates drop ship purchase orders, pick slips,the *Pick Message from Order Administration (CWPickOut)*, or invoices; also, if the vendor is flagged to use the Order Orchestration Drop Ship Integration, the drop ship purchase order is automatically sent to Order Orchestration. See Drop Ship Processing for a process overview.

Drop ship items are items that you do not stock in inventory. When a customer places an order for a drop ship item, you order the item from your supplier (vendor). The vendor ships the item directly to your customer.

Generating drop ship pick slips by batch: You can generate drop ship pick slips by batch for selected vendors using Processing Drop Ship Orders by Batch (MDSB); however, you cannot generate drop ship purchase orders through that menu option. Batch processing of drop ship pick slips is available only for vendors whose Drop ship output field is set to Drop Ship Pick.

Scheduling drop ship orders: You can use the Drop Ship Processing DSHPROC periodic function (program name FLRDSHP) to schedule drop ship order processing for all drop ship purchase orders or pick slips. See Scheduling Jobs for more information.

Quotes: Drop ship items on quotes are not eligible for drop ship processing until the quote is converted to an order; see Entering Pre-Order Quotes for an overview and required setup.

Emailing drop ship purchase orders not available: Regardless of the setting of the Email Purchase Order (K80) system control value, sending drop ship purchase orders by email is not supported. See that system control value for more information.

Bypassing printable pick slips not available: Even if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected, the Select Vendors for Drop Ship Processing option still creates printable pick slips for eligible vendors. This system control value controls the generation of printable pick slips only when you use the Streamlined Pick Slip Generation (WSPS) option.

Submitting ship-for-pickup orders to Order Orchestration: If an order originating in Order Administration that is selected for drop ship processing is flagged to ship to a store location for customer pickup, the process sends a Submit Order request to Order Orchestration. See Ship-for-Pickup Orders for an overview.

Checking status for retail pickup or delivery orders: If a retail pickup or delivery order from Order Orchestration is selected for drop ship processing, the process sends a status inquiry request to Order Orchestration to confirm that the order has not been canceled since the last update on its status was received. See Retail Pickup (including Ship-for-Pickup) or Delivery Orders for an overview.

Drop ship authorization records in W status? Pick slip generation displays an error message if there are drop ship authorizations in W status. See DROPSHIP Authorization Records in W Status for a discussion.

In this topic:

- Select Vendors for Drop Ship Screen
- Drop Ship Processing
- Possible Drop Ship Output
- Reports

Select Vendors for Drop Ship Screen

Purpose: Use this screen to select vendors for drop ship processing and also to select whether to print drop ship purchase orders or generate the Pick Message from Order Administration (CWPickOut).

How to display this screen: Enter MDSP in the *Fast path* field at the top of any menu, or select Select Vendors for Drop Ship Picks from a menu.

Field	Description
Vendors	A code that defines the supplier of an item. Validated against the Vendor table; see Working with Vendors (WVEN). To select one or more vendors, enter the vendor number(s); otherwise, to select all vendors, leave the vendor fields blank. *Numeric, 7 positions; optional.*
Print drop ship purchase orders	Indicates whether the system prints drop ship purchase orders for the vendors specified in the *Vendor* field. You can select the sort sequence in which the drop ship purchase orders print. The sort option used previously defaults. Valid values are: • Blank = The system does not print drop ship purchase orders. • Purchase order print = The system prints drop ship purchase orders in purchase order number sequence. The system uses the PO Print Program for PO Print in PO Sequence (C76) system control value to print drop ship purchase orders in purchase order number sequence. • Vendor print = The system prints drop ship purchase orders in vendor number sequence. The system uses the PO Print Program (C64) system control value to print drop ship purchase orders in vendor number sequence. **Setup:** Drop ship purchase orders print only for vendors whose Drop ship output field on the second Vendor screen is set to Drop ship purchase order . **Drop ship pick slip/invoice:** When you print a drop ship purchase order, the system also prints a Drop Ship Pick Slip/ Invoice. If a vendor's *Drop ship output* field is set to Drop ship pick , the system prints a drop ship pick slip/invoice instead of a drop ship purchase order. **To print:** See Possible Drop Ship Output for information on how to print drop ship purchase orders or pick slips/invoices. **PO download trigger:** The system creates a purchase order download Add trigger record when the purchase order is printed. *Alphanumeric, 1 position; required.*
Fax invoices/picks to vendors	Indicates whether the drop ship pick slips/invoices should be faxed to the vendor instead of, or in addition to, printing. *This option is not currently implemented.*

Screen Option	Procedure
Continue to process drop ships, even if there is a pick slip generation error	Select Accept. The system sends all records in the CC Authorization Transaction table to the Authorization Service, including the authorization associated with the non-drop ship order. See Drop Ship Processing for an overview of how to handle any errors.
Return to Drop Ship Processing without processing drop ships	Select Reject. You return to the Select Vendors for Drop Ship Screen so you can correct any pick slip generation error before processing drop ships. See Drop Ship Processing for an overview of how to handle any errors.

Drop Ship Processing

The system performs the following procedures during drop ship processing:

#	Step
1.	An order is flagged as "Drop Ship" in order entry because it includes a drop ship item.
2.	The system checks the Item/SKU to determine the primary vendor assigned to the item/SKU that was ordered.
3.	The system processes credit card authorizations on the drop ship orders, if needed. The setting of the Authorize Only Merchandise for Drop Ship (C92) system control value determines the amount to authorize. Any orders whose credit cards are declined for authorization are not included in the drop ship process; see Using the Credit Card Authorization Interface.

> **Note:**
>
> If you process drop ships for all vendors, the system requests a single authorization for an order; however, if you process drop ships for selected vendors, the system requests a separate authorization for each vendor associated with a drop ship item on an order.

#	Step
4.	The system then checks the Vendor table to see if the Drop ship output field on the second Vendor screen is set to Drop ship pick, Drop ship purchase order, or OROB drop shipping (Order Orchestration's Supplier Direct Fulfillment module). If the *Drop ship output* field for the vendor is set to: Drop ship purchase order , the system generates a Purchase Order AND a Drop Ship Pick Slip/Invoice. Once the vendor confirms the order, you can confirm the shipment manually, using the Purchase Order Receipts menu option. Drop ship pick, the system generates a Drop Ship Pick Slip/Invoice or the Pick Message from Order Administration (CWPickOut). Once the vendor confirms the order, you can confirm the shipment manually, using the Manually Confirming Shipments (MCON) menu option. The system then produces the Drop Ship Batch Confirmation Report, which allows you to review the total costs of items on the drop ship pick slips. See Possible Drop Ship Output for an overview of output options. OROB drop shipping , the system automatically sends the drop ship purchase orders to Order Orchestration's Supplier Direct Fulfillment module for processing. See Interface with Order Orchestration's Supplier Direct Fulfillment Module: Overview and Setup for background. The system also: • generates a drop ship pick slip/invoice when sending the drop ship purchase order to Order Orchestration based on the settings described under Possible Drop Ship Output. • creates a pick download trigger (*File code* of PCH) in the IL Outbound Trigger table when generating a drop ship pick slip/invoice if the Create Generic Pick Download Triggers (I31) system control value is selected. The PICK_OUT process in Working with Integration Layer Processes (IJCT) generates the Pick Message from Order Administration (CWPickOut) for each of these trigger records.
5.	The system produces several reports related to drop ship processing; see Reports.

> **Note:**
>
> A drop ship order line is not eligible for processing until the current date plus the number of Lead days on the Create Vendor Item Screen equals or exceeds the Arrival date for the order line.

Example: On October 1, you enter an order for a drop ship item supplied to your customers by vendor 789. At the customer's request, you enter an *Arrival date* of December 15 . The vendor item's specified number of *Lead days* is 10. The order line is not eligible for processing until December 5.

PICKGEN auth records in W status: A pop-up window opens when you process drop ships if the system finds a pick control header record with a pick status of W (waiting for authorization) for a non-drop ship order paid with a credit card was not authorized during a previous pick slip generation process due to transmission failure.

The system creates a record in the Pick Control Header table when you generate pick slips. The pick control header record remains in a W pick status until the corresponding authorization transaction in the CC Authorization Transaction table receives an approved authorization. A pick slip is not produced until the credit card on the order receives an approved authorization.

When you see this pop-up window during drop ship processing, you can either:

- select Accept to generate drop ship orders without first re-sending the authorization transaction associated with the pick control header record in a W pick status for authorization. When you perform drop ship processing, the system sends all authorization records in the CC Authorization Transaction table to the authorization service for authorization, including the authorization transaction associated with the pick control header record in a W status. If you do this, a record remains in the Pick Control Header table for the non-drop ship order, but the corresponding authorization record no longer exists in the CC Authorization Transaction table. To generate a pick slip for the order, you need to delete the record from the Pick Control Header table and generate pick slips again.

  > **Note:**
  >
  > When you generate pick slips again, the system sends an authorization transaction to the authorization service for the order that was stranded in the Pick Control Header table. You need to make sure that you do not receive a double authorization for the order since the authorization transaction associated with the order was sent to the authorization service when you performed drop ship processing.

  > **Note:**
  >
  > You will continue to see this pop-up window when you process drop ships until you delete the record in the Pick Control Header table.

- select Reject to return to the Select Vendors for Drop Ship Screen without processing drop ships. You can verify with the authorization service whether the authorization associated with the pick control header record in a W status was received.
  - If the authorization was received by the authorization service, use the Reprocess Authorizations Screen (RPAA) to receive the authorization response. If the order receives an approved authorization, the system generates the pick slip and updates the record in the Pick Control Header table to a Z (authorized) status.
  - If the authorization was not received by the authorization service, check the CC Authorization Transaction table to verify that only the authorization transaction for the order exists. Then, use the Reprocess Authorizations Screen (RPAA) to resend the authorization transaction for authorization. If the order receives an approved authorization, the system generates the pick slip and updates the record in the Pick Control Header table to a Z (authorize) status.

> **Note:**
>
> If authorization transactions exist in the CC Authorization Transaction table for drop ship orders, the system sends the authorization transactions to the authorization service when you reprocess authorizations.

Possible Drop Ship Output

Depending on setup, the system can generate a printed copy of a Purchase Order, a Drop Ship Pick Slip/Invoice, or the Pick Message from Order Administration (CWPickOut), or various combinations. The conditions required to produce each type of output are described below. Also, if the vendor meets the conditions for more than one type of output, the system produces all qualifying output types. For example, if the vendor meets the conditions to print both drop ship purchase orders and pick slips/invoices, then all four outputs are produced.

The system prints a drop ship PO when:

- the vendor's *Drop ship output* field is Drop ship purchase order , and
- the vendor's *Print PO* field is selected , and
- the Print drop ship purchase orders field at the Select Vendors for Drop Ship Screen is set to Vendor print or Purchase order print.

The system prints a drop ship pick slip/invoice when:

- the system prints a drop ship PO (see above for the requirements).
- the vendor's *Drop ship output* field is Drop ship pick or OROB drop shipping .

A separate drop ship pick slip/invoice prints for each ship-alone item if the Print One Drop Ship Invoice per Ship Alone Item (E38) system control value is selected ; however, this system control value does not apply to drop ship purchase orders sent to Order Orchestration.

The system also creates pick download triggers (*File code* of PCH) in the IL Outbound Trigger table when you generate a drop ship pick slip/invoice if the Create Generic Pick Download Triggers (I31) system control value is selected . The PICK_OUT process in Working with Integration Layer Processes (IJCT) generates the Pick Message from Order Administration (CWPickOut) for each of these trigger records.

> **Note:**
>
> The system deletes the drop ship pick slip/invoice once the associated drop ship purchase order is closed or cancelled and all IL Outbound Trigger records (WOIT) for the purchase order and drop ship pick slip/invoice are in an X Closed status.

Multiple items? The Allow Only Single Line on Drop Ship Pick (C82) system control value controls whether to include multiple items on a drop ship pick slip, or to generate separate pick slips; similarly, the Allow Only Single Line on Drop Ship PO (M13) controls whether to include multiple items on a drop ship purchase order, or to generate multiple purchase orders. See each system control value for more information.

Reports

The system produces the following reports during drop ship processing:

- Vendor Drop Ship Worksheet: Generated whenever you run drop ship processing.
- Drop Ship Purchase Order List: Generated when you process drop ship purchase orders. This list does not include drop ship pick slips.
- Drop Ship Pick Slip/Invoice: Generated when you process drop ship pick slips. The system also generates a drop ship pick slip/invoice when you generate drop ship purchase orders.
- Purchase Order: Generated for drop ship purchase orders when you enter Purchase order print or Vendor print in the Print drop ship purchase orders field on the Select Vendors for Drop Ship screen.
- Declined Drop Ships: Generated whenever you run drop ship processing.
- Credit Card Authorization Listing: Generated for drop ship orders requiring credit card authorization.
- Address Verification Response List: Generated for drop ship orders requiring credit card authorization and AVS verification.

Print program: The system uses the Drop Ship Pick Print Program (E92). If this system control value is blank, the system uses the Pick Printing Program (C37). The standard pick slip printing program name is PICKG (graphical form).

Active procedure: When you accept you entries at this screen, the system creates an active procedure so that another user cannot process drop ship orders while the program is already running. A second batch job will be aborted if it is submitted while the first batch job is active.

Displaying Pick Slip Generation Inquiry (DPSI)

Purpose: Display Pick Slip Generation Inquiry is a management tool that allows you to monitor warehouse performance and pick slip generations. This option provides a detailed listing of the picks that have been generated and their current status.

Pre-printed pick slips: Display Pick Slip Generation Inquiry does not include pick slips in a pre-printed status (G Generated No Authorization or H Generated Has Authorization); see Creating Pre-Generated Picks.

In this topic:

- Display Pick Slip Generation Inquiry Screen
- Display Picks for Batch Screen
- First Display Pick Control Header Screen
- Second Display Pick Control Header Screen
- Work with Pick Details Screen
- Display Pick Control Details Screen
- Display Pick Locations Screen

Display Pick Slip Generation Inquiry Screen

How to display this screen: Enter DPSI in the *Fast path* field at the top of any menu or select Display Pick Slip Generation Inquiry from a menu.

Field	Description
Date	The date the pick slip was printed. This is the date for the first pick slip in the batch sorted in cart batch number, pick control number sequence. *Numeric, 6 positions (in user date format); display-only.*
Time	The time the pick slip was printed. This is the time for the first pick slip in the batch sorted in cart batch number, pick control number sequence. *Numeric, 6 positions (HHMMSS format); display-only.*
Billing batch	A system-generated batch number that is assigned to each pick slip run. *Numeric, 7 positions; optional.*
Pick # range	Each pick slip is assigned a number; this field displays the range of pick slip numbers that were picked. *Numeric, 3 positions; display-only.*
Total printed	The total number of pick slips that were printed, for each date. *Numeric, 3 positions; display-only.*
Cnfrm (Confirmed)	The total number of pick slips that were shipped and billed, for each date. This is the number of pick slips that are in a Confirmed (C) status. *Numeric, 3 positions; display-only.*
Packd (Packed)	The total number of pick slips that were packed. This is the number of pick slips that are a Packed (P) status. *Numeric, 3 positions; display-only.*
Void	The total number of pick slips that were voided. This is the number of pick slips that are in Void (V) status. *Numeric, 3 positions; display-only.*
Suspd (Suspended)	The total number of pick slips that have been suspended. This is the number of pick slips that are in a Suspended (S) status. *Numeric, 3 positions; display-only.*
Outsd (Outstanding)	The total number of pick slips that have been printed, but not yet confirmed. This is the number of pick slips that are in a Manifest (M) or Carryover (O) status. *Numeric, 3 positions; display-only.*

Screen Option	Procedure
Display picks	Select Display Picks for a pick to advance to the Display Picks for Batch Screen.

Display Picks for Batch Screen

Purpose: Use this screen to review pick information including the batch number, pick number, printed/confirmed date, and the status of the pick.

How to display this screen: Select Display Picks for a pick at the Display Pick Slip Generation Inquiry Screen.

Field	Description
Billing batch #	A system-generated batch number that is assigned to each pick slip run. *Numeric, 7 positions; display-only.*
Pick #	The system-assigned control number for this pick. *Numeric, 7 positions; display-only.*
Printed	The date the pick was printed. *Numeric, 6 positions (in user date format); display-only.*
Confirmed	The date the pick was shipped and billed. *Numeric, 6 positions (in user date format); display-only.*
Status	The status of this pick. Valid values: • Open • Submitted to async • Billing pending • Confirmed • Declined authorization • Async processing error • Manifest submission • CarryOver • Packed • Reprinted • Suspended • Void • Waiting for Authorization • Authorized *Optional.*
Reprint	The pick control number that has been reprinted. *Numeric, 7 positions; display-only.*

Screen Option	Procedure
Display pick control header information	Select Display for a pick to advance to the First Display Pick Control Header Screen.
Work with pick details	Select Details for a pick to advance to the Work with Pick Details Screen.

First Display Pick Control Header Screen

Purpose: Use this screen to review complete pick information including the control and billing batch numbers, pick status, generation type, date/time for last update, confirmation, printing, number of labels, cartons, zones, warehouse, and drop points.

Select OK at this screen to advance to the Second Display Pick Control Header Screen, where you can review additional pick control header information.

How to display this screen: Select Display for a pick at the Display Picks for Batch Screen.

Field	Description
Control #	The control number assigned to a batch of picks. *Numeric, 7 positions; display-only.*
Billing batch #	A system-generated batch number that is assigned to each pick slip run. *Numeric, 7 positions; display-only.*
Pick status	The description of the pick's status. Valid values: • Open • Submitted to async • Billing pending • Confirmed • Declined authorization • Async processing error • Manifest submission • CarryOver • Packed • Reprinted • Suspended • Void • Waiting for Authorization • Authorized *Display-only.*
Generation type	The type of pick slip being generated. Valid values: • Regular = no special requirements • Drop/Ship = requires drop ship processing • Special/Handling = includes special handling items • Master = includes all items in the pick slip run. *Display-only.*
Date/time last update	The date and time this pick was last changed. Printing the pick is considered to be a change. *Numeric, 6 positions (in user date format, HHMMSS format); display-only.*
By	The process that created the Pick Control Header record. From the *Last update by user* field in the Pick Control Header table. See Creating Pre-Generated Picks for a list of processes. *Alphanumeric, 10 positions; display-only.*
Date/time printed	The date and time this pick was printed. *Numeric, 6 positions (in user date format, HHMMSS format); display-only.*
# of labels	The total number of labels printed for this pick slip. Used in the following situations: • If you decide to print multiple labels for this pick slip manually. • If the system divides an order into multiple pick slips, each one will get a unique control number. *Numeric, 3 positions; display-only.*

Field	Description
# of labels scanned	The total number of shipping labels scanned, or wanded, for this pick. *Numeric, 3 positions; display-only.*
Cart batch #	The system-assigned number that represents the batch pick slip list for each cart. If the system determines that there is not enough bins in the cart to accommodate the batch, a new cart/batch number is created. *Numeric, 3 positions; display-only.*
# of cartons	The number of cartons required to ship each order. Determined by the Cubing feature. *Numeric, 3 positions; display-only.*
Pick zones (1-6)	The warehouse zone(s) on this pick slip. The System Control table value, Maximum Number of Zones (B41), defines the maximum number of zones (up to 6) on a pick slip. Example of how pick zones are used: A pick slip with items to be picked in zones A, B, and D will not be included in the same batch as a pick slip with items to be picked in zones A, B, and R. However, a pick slip with items to be picked in zones A, B, and D will be included in the same batch as a pick slip with items to be picked in zones A and D. *Numeric, 3 positions; display-only.*
Include on S/J	• Selected = Indicates that this pick slip should be included on the Sales Journal report. • Unselected = Indicates that this pick should not be included on the Sales Journal report.
# of lines	The number of items on the pick slip. *Numeric, 3 positions; display-only.*
Ship via	The code that represents the carrier for this order. Validated against the Ship Via table. *Numeric, 2 positions; display-only.*
Hazard code	A user-defined code used to categorize an item as a hazardous material that requires special storage and/or handling. Validated against the Item Hazard table; see Working with Hazardous Item Codes (WHAZ). This information is passed to TanData. *Numeric, 2 positions; display-only.*
Warehouse	A code that represents the default warehouse. Validated against the Warehouse table. *Numeric, 3 positions; display-only.*
Drop point	A code that represents a location to which merchandise will be shipped from your warehouse. • Drop points are UPS facilities, typically. • Drop points print as the return address on the pick slip and are the destination to which undeliverable packages are returned. • Drop points are used in zone skipping. *Numeric, 3 positions; display-only.*

Second Display Pick Control Header Screen

Purpose: Use this screen to review additional pick information, such as the order number and customer information.

How to display this screen: Select OK at the First Display Pick Control Header Screen.

Field	Description
Control #	The control number assigned to this batch of picks. *Numeric, 7 positions; display-only.*
Reprinted control #	The control number assigned to the batch of picks that have been reprinted. *Numeric, 7 positions; display-only.*
Merch	The total value of merchandise. A total of the item price multiplied by the quantity ordered and does not include freight, additional charges, tax, or handling. *Numeric, 20 positions with a 2-place decimal; display-only.*
Freight	The total charge for shipping an order. Does not include any additional charges associated with shipping the order. Based on the freight method defined for the source code on the order. The total may depend on the quantity or weight of items ordered, or on the dollar value of the order as a whole. *Numeric, 20 positions with a 2-place decimal; display-only.*
Add'l freight	The total dollar value for additional freight charges, above the order's regular shipping charges. The total of the additional freight charges defined for the shipper(s). Additional freight charges are defined in the Ship Via table. *Numeric, 20 positions with a 2-place decimal; display-only.*
Add'l chgs	The total extra charges added to the order. Additional charges can be: • Service charges, based on the dollar value of the merchandise, • Additional shipping charges, or • Guaranteed service charges. *Numeric, 20 positions with a 2-place decimal; display-only.*
Handling	The total charge for special handling or gift wrapping. The full total of the handling charges for each item multiplied by the quantity ordered. The SKU/Offer table controls whether the item is eligible for special handling and the charge for special handling. *Numeric, 20 positions with a 2-place decimal; display-only.*
Tax	The total sales tax on the order. Based on the merchandise value. The system calculates sales tax for the order by multiplying the merchandise amount by the tax rate for the shipping destination. See Entering Orders for additional information. *Numeric, 20 positions with a 2-place decimal; display-only.*
GST	Canadian Goods and Services tax. A tax method is defined for each postal code to accommodate the varying tax requirements in each province, when shipping from Canada. *Numeric, 20 positions with a 2-place decimal; display-only.*
PST	Provincial Services tax. A tax method is defined for each postal code to accommodate the varying tax requirements in each province, when shipping from Canada. *Numeric, 20 positions with a 2-place decimal; display-only.*

Field	Description
Paid	The amount paid by the customer. *Numeric, 20 positions with a 2-place decimal; display-only.*
Total order	The sum of all charges including merchandise, freight, additional freight, tax, handling, and additional charges. *Numeric, 20 positions with a 2-place decimal; display-only.*
Due	The balance due. If this is a credit, the system displays the amount with CR beside the value. The amount due is calculated by subtracting the Paid amount from the Total Order amount. *Numeric, 20 positions with a 2-place decimal; display-only.*
PO #	The customer's purchase order number. *Alphanumeric, 15 positions; display-only.*
Order #	A unique number assigned by the system to identify an order. Every order on the system is assigned an order number. *Numeric, 8 positions; display-only.*
Customer #	A unique number assigned by the system to identify a customer. Every customer on the system is assigned a customer number. *Numeric, 9 positions; display-only.*
Name	The name of the customer who placed the order. *Alphanumeric, 15 positions (first name), 1 position (initial), 25 positions (last name); display-only.*
Company name	The name of the company that placed the order. *Alphanumeric, 30 positions; display-only.*
Address	The customer's street address. *Alphanumeric, 32 positions; display-only.*
Apartment	The customer's apartment, suite, rural route, or floor number. *Alphanumeric, 10 positions; display-only.*
City/St/Postal/ Cntry	The city, state, postal zip code, and country where the customer receives mail or shipping. State codes are defined in and validated against the State table, which is accessible through the Work with Countries menu option; see Setting Up the Country Table (WCTY). *Alphanumeric, 25 positions (city), 2 positions (state), 10 positions (postal code), 3 positions (country); display-only.*
Delivery code	Identifies whether the customer is Business or Residential. Used to determine shipping charges. Valid values: • Business • Residential *Display-only.*
PO box?	Indicates whether the shipper will deliver packages to a post office (P.O.) box. Any address in which P.O. Box or APO/FPO appears must be delivered to a post office box. • Selected = the shipper delivers packages to post office boxes. • Unselected = the shipper does not deliver packages to post office boxes.

Screen Option	Procedure
Display detail lines	Select Display Detail Lines to advance to the Work with Pick Details Screen.

Work with Pick Details Screen

Purpose: Use this screen to review the line number, item and SKU information, and the quantity printed.

How to display this screen: Select Detail Lines at the First Display Pick Control Header Screen or the Second Display Pick Control Header Screen.

Field	Description
Line #	A system-assigned detail line number on the order. Up to 999 detail lines may be entered on an order. Order lines are presented in descending sequence so that the most recent order line displays first. *Numeric, 3 positions; display-only.*
Item	A code that represents a unit of inventory on an order detail line. *Alphanumeric, 12 positions; display-only.*
SKU	A code that further identifies the item. *Alphanumeric, three 4-position fields; display-only.*
Quantity printed	The number of units of the item printed and the quantity which should be shipped. *Numeric, 5 positions; display-only.*

Screen Option	Procedure
Display pick control details	Select Display for a line to advance to the Display Pick Control Details Screen.
Display pick locations	Select Locations for a line to advance to the Display Pick Locations Screen.

Display Pick Control Details Screen

Purpose: Use this screen to review the pick control details for each order line.

How to display this screen: Select Display for an order line on the Work with Pick Details Screen.

Field	Description
Order #	A unique number assigned by the system to identify an order. Every order on the system is assigned an order number. *Numeric, 8 positions; display-only.*
Ship-to #	Indicates the number of shipping addresses for the order. The system assigns a sequential ship-to number to every order. The first ship-to address is assigned the number 1. *Numeric, 3 positions; display-only.*

Field	Description
Seq # (Sequence number)	A number assigned to a warehouse location and used to verify the location number that is either entered, scanned, or system-loaded. *Numeric, 3 positions; display-only.*
Control #	The control number assigned to a pick slip. *Numeric, 7 positions; display-only.*
Line #	The line number on the order. Up to 999 detail lines may be entered on an order. Order lines are presented in descending sequence so that the most recent order line displays first. *Numeric, 3 positions; display-only (assigned by the system).*
Item	A code that represents a unit of inventory on the order detail line. *Alphanumeric, 12 positions; display-only.*
SKU	A code that further identifies the item. *Alphanumeric, three 4-position fields; display-only.*
Original print qty	The original quantity that was printed on the pick. This becomes important if the quantity on the pick is changed. *Numeric, 5 positions; display-only.*
Qty printed	The number of units of the item printed and the quantity which should be shipped. *Numeric, 5 positions; display-only.*
Qty packed	The number of units of the item packed and the quantity which should be shipped. *Numeric, 5 positions; display-only.*
Qty ordered	The number of units of the item ordered. *Numeric, 3 positions; display-only.*
Qty B/O (Quantity backordered)	The number of units of the item backordered. *Numeric, 3 positions; display-only.*
Price	The system price of a single unit of the item. The price is assigned by the system, but may be overridden in Order Entry. *Numeric, 13 positions with a 2-place decimal; display-only.*
Extension	The total price of the order. Calculated by multiplying the Unit Price by the Quantity Shipped. *Numeric, 11 20 with a 2-place decimal; display-only.*
Special handling	The charge for special handling a single unit of the item. The SKU/ Offer table controls whether the item is eligible for special handling and the charge for special handling. *Numeric, 13 positions with a 2-place decimal; display-only.*
Extension	The total special handling charges for the order. Calculated by multiplying the Special Handling charge by the Quantity Shipped. *Numeric, 20 positions with a 2-place decimal; display-only.*
Gift wrap	The charge for gift wrapping a single unit of the item. The SKU/ Offer table controls whether the item is eligible for gift wrapping and the charge for gift wrapping. *Numeric, 13 positions with a 2-place decimal; display-only.*
Extension	The total gift wrapping charges for the order. Calculated by multiplying the Gift Wrap charge by the Quantity Shipped. *Numeric, 20 positions with a 2-place decimal; display-only.*

Field	Description
Freight	The total charge for shipping an order. Does not include any additional charges associated with shipping the order. The system performs this calculation based on the freight method defined for the source code on the order. The total may depend on the quantity or weight of items ordered, or on the dollar value of the order as a whole. *Numeric, 20 positions with a 2-place decimal; display-only.*
Tax	The total sales tax on the order. Based on the merchandise value. The system calculates sales tax for the order by multiplying the merchandise amount by the tax rate for the shipping destination. See Setting Up the Zip/City/State (Postal Code) Table (WZIP) and Working with Customer Tax Status. *Numeric, 20 positions with a 2-place decimal; display-only.*
GST (Canadian Goods and Services tax)	A federal-level tax that may apply to orders within Canada. *Numeric, 20 positions with a 2-place decimal; display-only.*
PST (Provincial Services tax)	A province-level tax that may apply to orders within Canada. *Numeric, 20 positions with a 2-place decimal; display-only.*
Line status	The status of the order detail line. Valid values: • C = Cancel • H = Hold • Blank = Open *Alphanumeric, 1 position; display-only.*
Backorder control	Specifies what action should be taken for this line. Valid values: • C = Ship and cancel remainder • X = Backorder and cancel order • Blank = Ship and backorder the remainder. *Alphanumeric, 1 position; display-only.*
Effect inventory (Effect on inventory)	Indicates whether this order detail line affects the inventory count. For example, you may not want a mailer that is included in each shipment to be reflected in your actual inventory count. • selected = This order detail line affects inventory count. • unselected = This order detail line does not affect inventory count.
Carton #	The number assigned to the carton by the system. *Numeric, 3 positions; display-only.*
Cart bin #	The number assigned to the cart/bin by the system. *Numeric, 3 positions; display-only.*
Requires special (Requires special handling)	Indicates whether or not this order detail line requires special handling. • selected = This order detail line requires special handling. • unselected = This order detail line does not require special handling.

Display Pick Locations Screen

Purpose: Use this screen to review the warehouse, zone, location, quantity picked and cart batch information.

How to display this screen: Select Locations for an order line at the Work with Pick Details Screen.

Field	Description
Whs	A code that represents the primary warehouse. Validated against the Warehouse table. *Numeric, 3 positions; display only.*
Zone	The zone(s) in the warehouse that is used for this pick slip. You can have up to 6 zones on a pick slip. The Maximum Number of Zones (B41) system control value defines the maximum number of zones on a pick slip. *Numeric, 3 positions; display only.*
Location	A code that represents a warehouse location where merchandise is stored. The warehouse location code can consist of a zone/aisle/shelf/bin combination, or it can be any user-defined code. The location code prints on picks slips and reports. Example: The location A010201 indicates: `Zone Aisle Shelf Bin` `A 01 02 01` *Alphanumeric, 7 positions; display only.*
Qty picked	The quantity of the item that has been picked from this warehouse. *Numeric, 3 positions; display only.*
Cart batch	The batch pick slip list that is assigned to each cart. *Numeric, 3 positions; display only.*

Working with Pick Slip Messages (WPSM)

Purpose: The Work with Pick Slip Messages screen is used to create, change, delete, or display messages. Messages to be included on pick slips can be customer service messages, warehouse messages, gift messages, etc. The format of the message determines where the message will print.

In this topic:

- Work with Pick Slip Messages Screen
- Create Pick Slip Message Pop-up Window

Work with Pick Slip Messages Screen

How to display this screen: Enter WPSM in the *Fast Path* field at the top of any menu.

Field	Description
Message	A code that represents the message. *Alphanumeric, 2 positions; optional.*

Screen Option	Procedure
Create a new pick slip message	Select Create to advance to the Create Pick Slip Message Pop-up Window.
Change a pick slip message	Select Change for the *Opt* field to advance to the Change Pick Slip Message window. At the Change window you can change any information except the Message number. See Create Pick Slip Message Pop-up Window for field descriptions.

Create Pick Slip Message Pop-up Window

To create a pick slip message: At the Work With Pick Slip Message screen, select Create.

Field	Description
Message	A code that represents the pick slip message. *Numeric, 2 positions.* *Create screen: required.* *Change screen: display-only.*
Message text	You can enter up to 3 lines of message text. This free-form message text will print on each pick slip. *Alphanumeric, 40 positions (each line); required.*

Streamlined Pick Slip Generation (WSPS)

Purpose: Use streamlined pick slip generation to:

- Create and work with pick slip generation templates that determine the pre-generated picks to select for pick slip generation.
- To advance to the Display Operations Control Summary Screen.
- Generate pick slips for a selected pick slip generation template.

Pick slip generation options: Pick slip generation options define the criteria to use when selecting pre-generated picks for pick slip generation. You can select pre-generated picks for generation based on a specified:

- warehouse
- source category
- ship via
- pay type
- item
- status (H Generated Has Authorization status)
- order
- line of business
- location class
- arrival date range
- sold to customer

- state
- postal code range
- number of pick lines

In addition, you can select pre-generated picks for generation based on whether the associated order is flagged as a gift order, the pick contains a single line, or an item on the pick contains a special handling code, requires gift wrapping, or is flagged as oversized.

Generating pick slips: The system uses the pick slip generation options, system control values, and order information to create the pick slip. When you select Generate Picks for a pick slip generation template, the system submits a batch job (PICK_GEN) to perform batch authorization, allocate stock, sort the pick slips, and print the picking documents. See Performing Pick Slip Generation for an overview and processing details.

Bypass printable pick slips? You can expedite the pick slip generation process even further by omitting the generation of printable pick slips. To do so, select the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value. For example, you might select this option if you use the *Generic Pick Out API* to communicate with your warehouse management system and do not need to print pick slips. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Also see the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value for a discussion of the differences in processing and print output when you omit printable pick slip generation.

Scheduling pick slip generation: You can schedule when pick slip generation runs for a particular pick slip generation template using a periodic function whose *Program name* is PFR0107 and whose *Parameter* matches the pick slip generation template's *Description*. See Scheduling Pick Slip Generation for instructions.

Picks not included? If you run pick slip generation and the system does not include the picks you were expecting, you can use Pick Print Eligibility (WPPE) to determine the reason why the picks for an order were not included.

About Zones

The term *Zone* is used in three specific contexts in pick generation:

- UPS or Parcel Post Shipping zones: These shippers have divided the country into zones, which are used to determine shipping charges. UPS and Parcel Post shipping zones are defined in and validated against the SCF Ship Via table. See Working with SCF/Ship Via Values (WSHV).
- Geographic zones: Geographic zones are regions of the country which relate to weather conditions. Geographic zones are used in zone reservation processing to control shipping dates for weather-sensitive (zone reservation coded) inventory such as plant stock. Geographic zones are defined in and validated against the Geographic Zone table. See Shipping Zone Reservation Overview.
- Warehouse zones: A warehouse zone is the major subdivision within a warehouse. Typically, a warehouse location is identified by zone, aisle, shelf and bin. For example, the location A010203 typically indicates Zone A, Aisle 01, Shelf 02, and Bin 03. Warehouse zone is a criterion for sorting pick slips as they are printed. In addition, you can specify warehouse zones and/or a range of aisles for replenishing your pickable locations. See Creating and Maintaining Locations (WLOC).

For more information: See Preparing Orders for Pick Slip Generation and Performing Pick Slip Generation.

In this topic:

Work with Streamlined Pick Slip Generation Screen

Purpose: Use this screen to review the streamlined pick slip generation options in your company, to create or change an option, and to generate pick slips or the Pick Message from Order Administration (CWPickOut).

For more information see the Order Administration Web Services Guide on https://support.oracle.com My Oracle Support (ID 2953017.1).

How to display this screen: Select Work with Streamlined Pick Slip Generation from a menu or enter WSPS in the *Fast path* field at the top of any menu.

Pick slip generation option description: The only field displayed on this screen is the *Description* of the pick slip generation option. This is a 50-position, alphanumeric field. You can edit the description at the Streamlined Pick Slip Generation Screen.

Screen Option	Procedure
Create a new pick slip generation option	Select Create to advance to the Streamlined Pick Slip Generation Screen, where you can create a new pick slip generation template.

Screen Option	Procedure
Delete a pick slip generation option	Select Delete for a pick slip generation template to delete it. **Note:** When you delete a pick slip generation template, the system does not delete its associated periodic function used to schedule when pick slip generation runs for the template; you must use Working with Periodic Functions (WPER) to delete the periodic function. See Scheduling Pick Slip Generation for more information.
Review or change a pick slip generation option	Select Options for a pick slip generation template to advance to the Streamlined Pick Slip Generation Screen, where you can review the current settings and change them if needed.
Generate pick slips	Select Gen Picks for a pick slip generation template to submit the PICK_GEN job. By default, this job is submitted to the PICKGEN job queue at the Job Management Screen rather than the QBATCH job queue. **Note:** In order to avoid errors during pick slip generation, DO NOT route the PICK_GEN job away from the PICKGEN job queue. The PICKGEN job queue processes one job at a time. If a PICKGEN job is running and another job is submitted, the job remains in a RDY status until the PICKGEN job queue is available to process it.

Streamlined Pick Slip Generation Screen

Purpose: Use this screen to create a new streamlined pick slip generation template, or to review or modify an existing template.

How to display this screen: Select Create at the Work with Streamlined Pick Slip Generation Screen to create a new option, or select Options at that screen for an existing option.

Field	Description
Description	A description of the pick slip generation option. **Scheduling pick slip generation:** The system automatically creates a periodic function for the pick slip generation template if you select the Create Periodic Function flag and the template's *Description* is 7 characters or less. **Note:** The *Description* must be 7 characters or less because the maximum length for the periodic function name is 7 positions. Also, in order to create a periodic function for the template, the description cannot contain a single quote ('). See Scheduling Pick Slip Generation for further instructions. **If you use multiple companies:** If you create a periodic function for a pick slip generation template and you use more than one company, you must make sure the *Description* for each pick slip generation template is unique across companies. *Alphanumeric, 50 positions; display-only if a periodic function for the pick slip generation template exists, otherwise, required.*
Max # of picks	The maximum number of picks to pick. This is the number of pre-generated picks (picks in a G Generated No Authorization or H Generated Has Authorization status) in the Pick Control Header table to select for pick slip generation. 0 = No limit. If you enter a number in this field, the system selects pre-generated picks, starting with the lowest order number. **Note:** If an order is split into multiple picks, the system may select some of the pick for the order for generation and leave the others for another pick slip generation run. See Splitting an Order Across Multiple Picks. *Numeric, 5 positions; optional.*
Gift orders only	Allows you to select pre-generated picks for pick slip generation based on the setting of the *Gift order* field for the Order Ship To (displayed on the Display Order Properties Screen in Order Inquiry). • selected = The system prints pick slips for orders whose *Gift order* field is selected. • unselected = The system prints pick slips for gift and non-gift orders.

Field	Description
Selected warehouses	Allows you to select pre-generated picks for pick slip generation based on selected warehouse(s). • selected = You advance to the Select Warehouse for Pick Slip Screen, where you can select warehouses for pick slip generation. The system performs pick slip generation for pre-generated picks that contain the specified warehouse(s). • unselected = The system prints pick slips for all valid warehouses.
Selected source categories	Allows you to select pre-generated picks for pick slip generation based on selected source categories. • selected = You advance to the Select Source Categories for Pick Slip Screen, where you can select source categories for pick slip generation. The system performs pick slip generation for pre-generated picks whose source code at the order header level is associated with a source code category selected for pick slip generation. If a pre-generated pick includes items that are not associated with the selected source category, the system includes these items on the printed pick slip. • unselected = The system prints pick slips for all valid source code categories.
Selected shippers	Allows you to select pre-generated picks for pick slip generation based on selected ship vias. • selected = You advance to the Select Shipper for Pick Slip Screen, where you can select ship vias for pick slip generation. The system performs pick slip generation for pre-generated picks that contain the specified ship via(s). • unselected = The system prints picks for all valid ship vias.
Selected payment types	Allows you to select pre-generated picks for pick slip generation based on selected pay types. • selected = You advance to the Select Pay Type for Pick Slip Screen, where you can select pay types for pick slip generation. The system performs pick slip generation for pre-generated picks that contain the specified pay type(s). • unselected = The system prints pick slips for all valid pay types.
Selected/excluded items	Allows you to select pre-generated picks for pick slip generation based on selected items. • selected = You advance to the Select Items for Pick Slip Screen, where you can select to include or exclude items for pick slip generation. – For items to include, the system performs pick slip generation for pre-generated picks that contain the specified item(s). If a pre-generated pick includes other items, the system includes these items on the printed pick slip as well. – For items to exclude, the system does not perform pick slip generation for pre-generated picks that contain the specified item(s). If a pre-generated pick includes other items, the system excludes these items from printing until the item that is flagged to exclude has been removed from the pre-generated pick. • unselected = The system prints pick slips for all valid items.

Field	Description
Preauthorized orders only	Allows you to select pre-generated picks for pick slip generation that are in an H Generated Has Authorization status. Valid values: • selected = The system performs pick slip generation for pre-generated picks in an H Generated Has Authorization status. **Note:** When Selecting Pre-Generated Picks for Pick Slip Generation, the system looks at Authorization History to determine if any picks in an H Generated Has Authorization status are associated with an expired authorization, and if so, the system changes the status of the pick to G Generated No Authorization. • unselected (default) = The system does not consider the status of the pre-generated pick when generating pick slips, and sends credit cards up for authorization during pick slip generation if they have not already received an authorization response; see Authorizations During Pick Slip Generation. **Note:** If *Preauthorized orders only* is unselected, the system does not generate pick slips for orders that contain a credit card payment method if the authorization service defined for the pay type is set up as online authorization only (the *Batch/online* field is set to I). See Performing Online Credit Card Authorizations for an overview of the online credit card authorization process.
Selected orders	Allows you to select up to 100 individual orders for pick slip generation. • selected = You advance to the Select Orders for Pick Slip Screen, where you can select orders for pick slip generation. The system performs pick slip generation for pre-generated picks that are associated with the specified order(s). • unselected = The system prints pick slips for all valid orders.
Selected lines of business	Allows you to select pre-generated picks for pick slip generation based on selected lines of business. • selected = You advance to the Select Lines of Business for Pick Slip Screen, where you can select lines of business for pick slip generation. The system performs pick slip generation for pre-generated picks that are associated with the specified line(s) of business. • unselected (default) = The system prints pick slips for all lines of business.

Field	Description
Selected location classes	Allows you to select pre-generated picks for pick slip generation based on selected location classes. • selected = You advance to the Select Location Class for Pick Slip Screen, where you can select location classes for pick slip generation. The system performs pick slip generation for pre-generated picks that contain an item associated with the specified location class. • unselected = The system prints pick slips for all valid location classes.
Excluded postal codes	Allows you to exclude specified postal codes from pick slip generation. • selected = You advance to the Select Postal Codes to be Excluded Screen, where you can specify the postal codes you wish to exclude from pick slip generation. **Note:** – If you define a Postal code range and also exclude specific postal codes within that range, the system includes all orders that are being shipped to the postal code range minus the specified postal codes that are excluded. For example, if you enter a postal code range of 01701 - 01999 and then exclude 01801 and 01581, the system would exclude 01801 from the postal code range. Postal code 01581 would be excluded regardless since it is outside the specified postal code range. – If you exclude a "zip plus 4" postal code, only postal codes that specify the extra 4 digits are excluded; for example, if you exclude 01468-1556, only postal code 01468-1556 is excluded and any postal code that does not specify the extra 4 digits is not excluded. If you exclude a postal code and do not specify the extra 4 digits, then that postal code, regardless of the extra 4 digits is excluded. • unselected = The system prints pick slips for all valid postal codes.

Field	Description
Arrival date range	Allows you to select pre-generated picks for pick slip generation based on a specified arrival date range. The arrival date is the date when the customer wants to receive the order. To determine the arrival dates to include, the system uses the following calculation: `Arrival Date from Order Ship To - (Pick Processing Days (B37) + Ship Via Lead Days in WSHV) < or = Today's Date` The system generates pick slips if the system-calculated date on the pre-generated pick is equal to or earlier than today's date; otherwise, the system holds printing the picks until the date is within the allotted time frame (the arrival date range). The starting (first) date you enter must be earlier than the ending (second) date. Also, an ending date is required if you enter a starting date; however, the starting date is always optional. **Note:** The system selects pre-generated picks for pick slip generation based on the arrival date defined for the order ship to; the system does not look at the arrival date defined for an order line. *Numeric, two 6-position fields; optional.*
Override all orders to via	Allows you to supersede the ship via code on the pick and to ship all orders via the designated shipper whose code you enter here. Ship Via codes are defined in and validated against the Ship Via table. *Numeric, 2 positions; optional.*
Pick message code	A code that represents the pick slip message. See Working with Pick Slip Messages (WPSM). *Alphanumeric, 2 positions; optional.*
Pick message text	The text of the message. This free-form message will print on each pick slip. See Working with Pick Slip Messages (WPSM). *Alphanumeric, 50 positions (each line); display-only.*
Selected sold-to customers	Allows you to select pre-generated picks for pick slip generation based on selected sold-to customers. • selected = You advance to the Select Customers for Pick Slip Screen, where you can select sold to customers for pick slip generation. The system performs pick slip generation for pre-generated picks that contain the specified sold to customer. • unselected = The system prints pick slips for all valid sold-to customers.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Selected states</td><td>Allows you to select pre-generated picks for pick slip generation based on selected or excluded states.
selected = You advance to the Select State for Pick Slip Screen, where you can select states to include or exclude for pick slip generation.
unselected = The system prints pick slips for all states.</td></tr>
<tr><td>Special Handling</td><td>Allows you to select pre-generated picks for pick slip generation based on the presence of a special handling code for an item.
Include = Generate pick slips for pre-generated picks regardless of the presence of a special handling code for an item.
Only = Generate pick slips for pre-generated picks that contain an item that requires special handling. If the pre-generated pick contains other items that do not require special handling, the system includes these items on the printed pick slip.
Exclude = Generate pick slips for pre-generated picks that do not contain an item that requires special handling.
Note:
If the Split Special Handling Picks (L44) system control value is selected, the system creates a separate pre-generated pick for items on an order that contain a special handling code; otherwise, pre-generated picks contain items with and without special handling. See this system control value for examples.</td></tr>
<tr><td>Single line picks only</td><td>Allows you to select pre-generated picks for pick slip generation based on the number of pick control detail records.
selected = Generate pick slips for pre-generated picks that have only one pick control detail. If you select this option, you cannot use the Picks with...X lines or less/more option.
unselected = Generate pick slips for pre-generated picks regardless of the number of pick control details.</td></tr>
<tr><td>Gift wrap picks only</td><td>Allows you to select pre-generated picks for pick slip generation that contain an item that requires gift wrap (the Gift wrap field for one or more of the items on the pre-generated pick is selected).
selected = Generate pick slips only for pre-generated picks that contain a gift wrap item. If the pre-generated pick contains other items that do not require gift wrap, the system includes these items on the printed pick slip.
unselected = Generate pick slips for pre-generated picks regardless of whether a gift wrap item is on the pre-generated pick.</td></tr>
</table>

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Bulk picks only</td><td>Allows you to select pre-generated picks for pick slip generation that contain a bulk item (the Oversized field for the one or more of the items on the pre-generated pick is selected).
selected = Generate pick slips only for pre-generated picks that contain a bulk item. If the pre-generated pick contains other items that are not flagged as oversized, the system includes these items on the printed pick slip.
unselected = Generate pick slips for pre-generated picks regardless of whether a bulk item is on the pre-generated pick.</td></tr>
<tr><td>Postal code range</td><td>Allows you to select pre-generated picks for pick slip generation based on a specified range of zip codes (up to 10 positions, including numbers and letters).
The From postal code cannot be greater than the To postal code. Letters are considered lower than numbers.
If you enter a 5 digit postal code, the system includes any 9 digit postal codes that fall within the range; for example, if you enter 01701 to 01901, the system includes pre-generated picks that contain zip code 01880-9999.
If you enter a 9 digit postal code, such as 01468-0000 to 01469-0000, the system does not include pre-generated picks that contain zip code 01468 since this zip code is less than 01468-0000. To include 01468 in the postal code range, you must define the range as 01468-01469.
If you define a postal code range and also Excluded postal codes within that range, the system includes all orders that are being shipped to the postal code range minus the specified postal codes that are excluded. For example, if you enter a postal code range of 01701 - 01999 and then exclude 01801 and 01581, the system would exclude 01801 from the postal code range. Postal code 01581 would be excluded regardless since it is outside the specified postal code range.
Postal codes are defined in and validated against the Postal Code table (WZIP); however, your entries in this field are not validated.
Numeric, 10 positions; optional.</td></tr>
</table>

Field	Description
Minimum amount to include backorders	The total value of all reserved but not printed lines on an order that contains at least one backordered unit, the amount must exceed the value entered in this field, then generate the pick slip. If there are no backorders on the order, the pick slip gets generated and this process is not evaluated. In other words, if you have a backorder and the items to ship is under a certain dollar amount, you may decide to wait for the backorder items before generating a pick slip to save on shipping costs. Backorder is the line status (open, held, or error) and the ordered qty minus shipped, canceled and sold out and not equal to reserved AND the drop ship indicator on the order detail line is blank. Reserved lines are any lines that have a reserved quantity and do not include lines that have a drop ship indicator on the line, order detail lines that have a reserved quantity but the line is in a H status, brokered items in a printed status (because they have a drop ship indicator on the order detail line), or lines that have a reserved quantity but the reserved quantity equals the printed quantity (which means those items are already in the middle of being shipped). Ship alone items or any items that will eventually split to a separate pick document are STILL considered when summing the reserved value as long as they are not already printed on previous pick. The system considers all pre-picks for the order when determining the reserved value and not just pre-picks that are being selected as part of that order. For example: • Item 1 b/o, item 2 has qty of 3 and is reserved with an unit price of $20.00. So the total reserved value is $60.00. If I entered $100.00 in this field, I won't generate a pick slip for item 2 because $60.00 does not exceed $100.00. If I entered $50 in this field, I would generate a pick slip because the total reserved for that order exceeds $50.00. • Item 1 b/o, item 2 has qty 1 with an unit price is 10.00 and is reserved, item 3 has qty 5 with an unit price of $7.00 and is reserved, item 4 is a drop ship item with price of $100.00. The total reserved value is (1 x $10.00 = $10.00) and (5 x 7.00 = $35.00) =$ 45.00. We ignore the drop ship item. So in this field if we enter a value of $30.00, we will select this order but if we enter a value of $45.00 or more we won't select this order. • Item 1 qty 2 reserved, item 2 qty 3 reserved, no backorders. It doesn't matter what is entered in this field, we will select this pick because it has no backorders so we don't perform any calculations. As long as the order qualifies based on other selection criteria, it will be included. *Numeric, 11,2 optional.*

Field	Description
Create Periodic Function	Defines whether a periodic function for the pick slip generation template exists so that you can schedule when pick slip generation runs for this template. • selected = A periodic function exists for the pick slip generation template. The system selects this flag if a periodic function exists whose *Function name* and *Parameter* is an exact match to the *Description* of the pick slip generation template. • unselected = A periodic function does not exist for the pick slip generation template. The system automatically creates a periodic function for the pick slip generation template if you select the *Create Periodic Function* flag and the template's *Description* is 7 characters or less. **Note:** The *Description* must be 7 characters or less because the maximum length for the periodic function name is 7 positions. Also, in order to create a periodic function for the template, the description cannot contain a single quote ('). See Scheduling Pick Slip Generation for further instructions. **Note:** This flag is display-only if a periodic function for the pick slip generation template already exists. **If you use multiple companies:** If you create a periodic function for a pick slip generation template and you use more than one company, you must make sure the *Description* for each pick slip generation template is unique across companies.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Picks with...X lines or less/ more</td><td>
Allows you to select pre-generated picks for pick slip generation that contain a specified number of pick lines. You can select to generate picks with X number of pick lines or less or X number of pick lines or more.
To generate: Enter the number of pick lines for the picks you wish to include in the pick slip generation run.

Select lines or less to include only picks that contain the specified number of pick lines or less. Example: If you enter 5 and select lines or less, the system includes picks that contain 5 pick lines or less.
Select lines or more to include only picks that contain the specified number of pick lines or more. Example: If you enter 5 and select lines or more, the system includes picks that contain 5 pick lines or more.

If you use this option, the Single line picks only option must be unselected.
Leave the Picks with number blank to generate pick slips for pre-generated picks regardless of the number of pick lines on the pre-generated pick.
The system uses the Pick Control Detail table to determine the number of lines associated with a pick. See:

Applying Pick Slip Preparation to an Order for more information on how the system creates records in the Pick Control Header table and Pick Control Detail table during pick slip preparation.
Splitting an Order Across Multiple Picks for more information on the reasons the system may split an order into several pre-generated picks.
Creating Pre-Generated Picks for more information on the updates the system makes to the Pick Control Header table and Pick Control Detail table during pick slip preparation.

Note:
Generating picks based on a specified number of pick lines does not guarantee that the pick will print on a specified number of pages. For example, line messages, special handling, gift wrap, and item comments can affect the number of lines that print on a single page of a pick form; see Pick Slip for more information on its contents.
Numeric, 5 positions; optional.
</td></tr>
</table>

Select this field...	To display the...
Selected warehouses	Select Warehouse for Pick Slip Screen.

Select this field...	To display the...
Selected source categories	Select Source Categories for Pick Slip Screen.
Selected shippers	Select Shipper for Pick Slip Screen.
Selected payment types	Select Pay Type for Pick Slip Screen.
Selected/Excluded items	Select Items for Pick Slip Screen.
Selected orders	Select Orders for Pick Slip Screen.
Selected line of business	Select Lines of Business for Pick Slip Screen
Selected location class	Select Location Class for Pick Slip Screen
Excluded postal codes	Select Postal Codes to be Excluded
Selected sold to customers	Select Customers for Pick Slip Screen
Selected states	Select State for Pick Slip Screen

Screen Option	Procedure
Review operations control summary information	Select Dsp Flash Rpt to advance to the flash report screens. See Reviewing Operations Control Summary (FLSH).
Review and change existing selection criteria	Select Review to review the options currently selected at the Streamlined Pick Generation screen and to make any changes. If multiple criteria are selected at the Streamlined Pick Generation screen, you advance to the related screen for each selected criterion.
Set selection criteria for this pick slip generation option	Select each desired criterion as described above, and click OK to advance to the related selection screen(s).
Accept your selections	Select Accept to save your selections and return to the Work with Streamlined Pick Slip Generation Screen. If you selected the Create Periodic Function flag, the system creates a periodic function for the pick slip generation template that you can use to schedule when pick slip generation runs for the template; see Scheduling Pick Slip Generation for more information.
Exit the screen without making changes	Select Exit.

Select Warehouse for Pick Slip Screen

Purpose: Use this screen to perform pick slip generation for pre-generated picks that contain the selected warehouses.

How to display this screen: Select the *Selected warehouses* field on the Streamlined Pick Slip Generation Screen.

Field	Description
Whs (Warehouse)	A code that represents a warehouse. Warehouses are defined and validated against the Warehouse table (WWHS); see Creating and Maintaining Warehouses (WWHS). *Numeric, 3 positions; optional.*
Description	The description of the warehouse. *Alphanumeric, 30 positions; optional.*
Orders avail (Orders available)	The number of orders available for pick slips. Not currently implemented. *Numeric, 7 positions; display-only.*
Sel (Selected)	Defines whether the system selects pre-generated picks for pick slip generation based on warehouse. • Yes = Perform pick slip generation for pre-generated picks that contain this warehouse. • No = Do not perform pick slip generation for pre-generated picks that contain this warehouse.

Screen Option	Procedure
Select a single warehouse	Select a warehouse to select it for pick generation. The system selects the *Sel* field.
Cancel a warehouse selection	Select Cancel for a warehouse to cancel the selection. The system unselects the *Sel* field.
Select all warehouses	Select Select All. The system selects the *Sel* field for all warehouses.

Select Source Categories for Pick Slip Screen

Purpose: Use this screen to perform pick slip generation for pre-generated picks associated with the selected source category.

> **Note:**
>
> - The system selects pre-generated picks whose source code at the order header level is associated with a source code category selected for pick slip generation.
> - If a pre-generated pick includes other items that are not associated with the selected source categories, the system includes these items on the printed pick slip.

How to display this screen: Select the *Selected source categories* field at the Streamlined Pick Slip Generation Screen.

Field	Description
Src (Source code category)	A category assigned to a group of source codes. Source code categories are assigned in the Source Code table and defined in and validated against the Source Code Category table. See Generating Forecasting Reports. *Alphanumeric, 2 positions; optional.*
Category	The description associated with the source code category. *Alphanumeric, 40 characters; display-only.*
Sel (Selected)	Defines whether the system selects pre-generated picks for pick slip generation based on source category. • Yes = Perform pick slip generation for pre-generated picks that contain this source category. • No = Do not perform pick slip generation for pre-generated picks that contain this source category.

Screen Option	Procedure
Select a single source code category	Select a source code category. The system selects the *Sel* field.
Cancel a source code category selection	Select Cancel for a source code category to cancel the selection. The system does not select the *Sel* field.
Select all source code categories	Select Select All. The system selects the *Sel* field for all pay types.

Select Shipper for Pick Slip Screen

Purpose: Use this screen to perform pick slip generation for pre-generated picks that contain the selected ship via. This screen displays a list of ship via codes that are available for selection.

How to display this screen: Select the *Selected shippers* field on the Streamlined Pick Slip Generation Screen.

Field	Description
Via (Ship via)	A code that represents the carrier for the pre-generated pick. Ship via codes are defined in and validated against the Ship Via table; see Working with Ship Via Codes (WVIA). *Numeric, 2 positions; optional.*
Description	The description of the shipper. *Alphanumeric, 30 positions; optional.*
Via pty (Ship via priority)	The ship via priority assigned to this ship via. Ship via priority controls how the system allocates inventory to backorders and sorts pick slips. Ship via priority ranges from 0 - 9 where 0 is the lowest priority and 9 is the highest priority. *Numeric, 1 position; optional.*

Field	Description
Sel (Selected)	Defines whether the system selects pre-generated picks for pick slip generation based on ship via. • Yes = Perform pick slip generation for pre-generated picks that contain this ship via. • No = Do not perform pick slip generation for pre-generated picks that contain this ship via.

Screen Option	Procedure
Select a single ship via	Select a shipper to select it. The system selects the *Sel* field.
Cancel a ship via selection	Select Cancel for a shipper to cancel the selection. The system does not select the *Sel* field.
Select all ship vias	Select Select All. The system selects the *Sel* field for all shippers.

Select Pay Type for Pick Slip Screen

Purpose: Use this screen to perform pick slip generation for pre-generated picks that contain the specified pay type.

How to display this screen: Select the *Selected payment types* field on the Streamlined Pick Slip Generation Screen.

Field	Description
Pay type	A user-defined code that represents the method of payment on the order. Each payment type must conform to one of the following categories: • Cash/check • Credit card Pay types are defined in and validated against the Pay Type table. See Working with Pay Types (WPAY). *Numeric, 2 positions; optional.*
Description	The description of the payment type. *Alphanumeric, 30 positions; optional.*
Orders avail (Orders available)	The quantity of orders that are available to pick. Not currently implemented. *Numeric, 7 positions; display-only.*
Sel (Selected)	Defines whether the system selects pre-generated picks for pick slip generation based on pay type. • Yes = Perform pick slip generation for pre-generated picks that contain this pay type. • No = Do not perform pick slip generation for pre-generated picks that contain this pay type.

Screen Option	Procedure
Select a single payment type	Select a payment. The system selects the *Sel* field.

Screen Option	Procedure
Cancel a payment type selection	Select Cancel for a payment type to cancel the selection. The system does not select the *Sel* field.
Select all pay types	Select Select All. The system selects the *Sel* field for all pay types.

Select Items for Pick Slip Screen

Purpose: Use this screen to include or exclude specified items during pick slip generation.

- For items to include, the system performs pick slip generation for pre-generated picks that contain the specified item(s). If a pre-generated pick includes other items, the system includes these items on the printed pick slip as well.
- For items to exclude, the system does not perform pick slip generation for pre-generated picks that contain the specified item(s). If a pre-generated pick includes other items, the system excludes these items from printing until the item that is flagged to exclude has been removed from the pre-generated pick.

> **Note:**
>
> You can specify up to 500 items at this screen. Although the system does not display an error message, it does not accept more than 500 items.

How to display this screen: Select the *Selected/Excluded Items* field at the Streamlined Pick Slip Generation Screen.

Field	Description
Item to... Include/Exclude	Defines whether you wish to include or exclude the specified items during pick slip generation. • Include = the system performs pick slip generation for pre-generated picks that contain the specified item(s). If a pre-generated pick includes other items, the system includes these items on the printed pick slip as well. • Exclude = the system does not perform pick slip generation for pre-generated picks that contain the specified item(s). If a pre-generated pick includes other items, the system excludes these items from printing until the item that is flagged to exclude has been removed from the pre-generated pick.
Item	A code that represents an item. You can specify up to 500 items at this screen. Although the system does not display an error message, it does not accept more than 500 items. *Alphanumeric, 12 positions; optional.*
SKU	The SKU code that further identifies the item. The three elements are defined in the System Control table and validated against the SKU Element (1, 2, 3) tables. If you do not define a SKU for a SKUed item, all SKUs for the item are either included or excluded during pick slip generation, based on the setting of the Item to... Include/Exclude field. *Alphanumeric, three 4-position fields; optional.*

Field	Description
Description	A description of the item. *Alphanumeric, 30 positions; display-only.*
Ord avail (Orders available)	The quantity of the item that is available to sell. Not currently implemented. *Numeric, 7 positions; display-only.*

Screen Option	Procedure
Define items to include or exclude from pick slip generation	Select Add or Change to enter items you wish to include or exclude from pick slip generation. Use the Item to... Include/ Exclude field to select whether you wish to Include or Exclude the specified item(s).Select OK to save your changes.
Delete an item from the list	Select Delete for an item to advance to the Confirm Delete window; at this window, select Delete to remove it from the list; otherwise, select Exit to cancel.

Select Orders for Pick Slip Screen

Purpose: Use this screen to perform pick slip generation for pre-generated picks associated with the specified order. You can specify up to 100 orders at a time.

A message indicates if an order you enter is on hold:

Order (14) is not open. Cannot be selected for Pick Slip.

You can release orders from hold through Release Held Orders. See Selecting Held Orders (ERHO).

How to display this screen: Select the *Selected Orders* field at the Streamlined Pick Slip Generation Screen.

Field	Description
Order #	A unique number assigned by the system to identify an order. An error message similar to the following indicates if the order is on hold: `Order (14) is not open. Cannot be selected for Pick Slip.` You can release orders from hold through Release Held Orders. See Selecting Held Orders (ERHO). Maximum number of orders: You can select up to 100 orders at a time for pick slip generation. If you attempt to enter more than 100 orders, the system displays an error message such as: `The number of orders selected (121) exceeds the maximum allowed (100).` *Numeric, 8 positions; optional.*

Field	Description
Name	The name of the customer who placed the order. Customer names are defined in and validated against the Customer Sold-to table. *Alphanumeric, 15 positions (first name), 1 position (initial), 25 positions (last name); display-only.*

Screen Option	Procedure
Add orders	Select Add.
Change selected orders	Select Change. The system displays the orders that you previously entered so that you can review your entries. **Note:** You cannot change an order number if you are in change mode. You must delete the order and then return to "add" mode and re-enter the order. The system displays a message if you attempt to enter a duplicate order number.

Select Lines of Business for Pick Slip Screen

Purpose: Use this screen to perform pick slip generation for pre-generated picks associated with the selected lines of business.

The system automatically assigns an order to a line of business in order entry or order maintenance if the order meets the requirements for a specific line of business assignment. See Working with Lines of Business (WLOB).

How to display this screen: Select the Selected lines of business field at the Streamlined Pick Slip Generation Screen.

Field	Description
Lines selected	The number of lines of business selected to print pick slips. Updated whenever you select or deselect a line of business. *Numeric, 2 positions; display-only.*
LOB code	A code used to identify a line of business. Line of business codes are defined in and validated against the Line of Business table. *Alphanumeric, 3 positions; optional.*
Description	A description of the line of business. *Alphanumeric, 40 positions; optional.*

Field	Description
Sel	Defines whether the system selects pre-generated picks for pick slip generation based on line of business. • Yes = Perform pick slip generation for pre-generated picks associated with this line of business. • No = Do not perform pick slip generation for pre-generated picks associated with this line of business.
Maximum (Maximum line count)	The maximum number of lines of business you can select to print pick slips. You can select up to 100 lines of business. *Numeric, 3 positions; optional.*

Screen Option	Procedure
Select a line of business	Select the line of business. The system updates the *Selected* field to selected.
Deselect a line of business	Select Cancel for the line of business to deselect it. The system updates the *Selected* field to unselected.
Select all lines of business	Select Select All. The system updates the *Selected* field for all lines of business to selected.

Select Location Class for Pick Slip Screen

Purpose: Use this screen to perform pick slip generation for pre-generated picks that contain an item associated with the selected location class.

Location classes represent a warehouse location, such as caged area or fragile area. Items, SKUs, and locations can be assigned location classes; however, this pick slip option evaluates the location class assigned to an item at the item level only.

You can assign a location class:

- to a location at the Create Location Screen.
- to an item at the Create Item Screen.

Splitting an order by location class: Order Management System uses the location class defined at the item level to determine if an order should split into several picks; see Splitting an Order Across Multiple Picks.

How to display this screen: Select the Selected Location Classes field at the Streamlined Pick Slip Generation Screen.

Field	Description
Loc class (Location class	A code that represents a location type, such as caged area or fragile area. Location classes are defined in and validated against the Location Class table; see Creating and Maintaining Location Classes (WLCL). *Alphanumeric, 2 positions; optional.*
Description	The description of the location class. *Alphanumeric, 30 positions; optional.*

Field	Description
Orders avail (Orders available	The quantity of orders that are available to pick. Not currently implemented. *Numeric, 7 positions; display-only.*
Sel (Selected)	Defines whether the system selects pre-generated picks for pick slip generation based on location class. • Yes = Perform pick slip generation for pre-generated picks that contain an item associated with this location class. • No = Do not perform pick slip generation for pre-generated picks that contain an item associated with this location class.

Screen Option	Procedure
Select a single location class	Select a location class to select it. The system selects the *Sel* field.
Cancel a location class selection	Select Cancel for a location class to cancel the selection. The system does not select the *Sel* field.
Select all location classes	Select Select All. The system selects the *Sel* field for all location classes.

Select Postal Codes to be Excluded Screen

Purpose: Use this screen to exclude specified postal codes from pick slip generation.

How to display this screen: Select the Excluded postal codes field at the Streamlined Pick Slip Generation Screen.

Field	Description
Postal code	A postal code you wish to exclude from pick slip generation. • If you define a Postal code range and also exclude specific postal codes within that range, the system includes all orders that are being shipped to the postal code range minus the specified postal codes that are excluded. For example, if you enter a postal code range of 01701 - 01999 and then exclude 01801 and 01581, the system would exclude 01801 from the postal code range. Postal code 01581 would be excluded regardless since it is outside the specified postal code range. • If you exclude a "zip plus 4" postal code, only postal codes that specify the extra 4 digits are excluded; for example, if you exclude 01468-1556, only postal code 01468-1556 is excluded and any postal code that does not specify the extra 4 digits is not excluded. If you exclude a postal code and do not specify the extra 4 digits, then that postal code, regardless of the extra 4 digits is excluded. Postal codes are defined in and validated against the Postal Code table (WZIP); however, your entries in this field are not validated. *Numeric, 10 positions; optional.*

Screen Option	Procedure
Exclude a postal code	Select Add or Change to enter postal codes you wish to exclude from pick slip generation. Select OK to save your changes.
Delete a postal code from the exclusion list	Select Delete for a postal code to advance to the Confirm Delete window; at this window, select Delete to remove it from the exclusion list; otherwise, select Exit to cancel.

Select Customers for Pick Slip Screen

Purpose: Use this screen to perform pick slip generation for pre-generated picks associated with the select sold to customer.

How to display this screen: Select the *Selected sold-to customers* field on the Work with Streamlined Pick Slip Generation Screen.

Field	Description
Customer #	A unique number assigned by the system to identify a customer who places an order. Customers are defined in and validated against the Customer Sold-to table; see Creating and Updating Sold-to Customers (WCST). *Numeric, 9 positions; optional.*
Name	The name of the customer who placed the order. Defined in and validated against the Customer Sold-to table. *Alphanumeric, 15 positions (first name), 1 position (initial), 25 positions (last name); display-only.*

Screen Option	Procedure
Add a customer selection	Select Add to add sold to customers to the requirements for pick slip generation. The system displays a message if you attempt to enter a duplicate customer number.
Change a customer selection	Select Change. The system displays the customers that you previously entered so that you can review your entries, and optionally delete any entries.

Select State for Pick Slip Screen

Purpose: Use this screen to:

- Perform pick slip generation for pre-generated picks that ship to the specified state(s), or
- Exclude pre-generated picks from pick slip generation that ship to the specified state(s).

> **Note:**
>
> A single pick slip template can have either the *Selected* field set to Yes (perform pick slip generation for the specified states) or Excl (exclude pick slip generation for the specified states). To use both settings, you must create a pick slip template that *includes* specified states and create a separate pick slip template the *excludes* specified states.

How to display this screen: Select the *Selected States* field at the Work with Streamlined Pick Slip Generation Screen.

Field	Description
Cty (Country)	A code which identifies a country. Countries are defined in and validated against the Country table. See Setting Up the Country Table (WCTY). *Alphanumeric, 3 positions; optional.*
State	A code which identifies a state. States are defined in Work with Countries. See Setting Up the Country Table (WCTY). *Alphanumeric, 2 positions; optional.*
Description	A description of the state. *Alphanumeric, 25 positions; display-only.*
Sel (Selected)	Indicates whether to perform pick slip generation for pre-generated picks that ship to this state. Yes = Perform pick slip generation for pre-generated picks that ship to this state. No (default) = The specified state has not been selected or excluded from pick slip generation. Excl = Do not perform pick slip generation for pre-generated picks that ship to this state. *Optional.*

Screen Option	Procedure
Select a state	Select a state. The system updates the *Selected* field to Y.
Deselect a state	Select Cancel for a state to deselect it. The system updates the *Selected* field to N.
Exclude a state	Select Exclude for a state to exclude the state from pick slip generation. The system updates the *Selected* field to X.
Select all states	Select Select All. The system updates the *Selected* field for all states to selected.

Pick Print Eligibility (WPPE)

Purpose: Use this menu option to determine whether the system will include picks for a specified order in the next pick slip generation run for the selected pick slip generation template.

The system determines which pre-generated picks to include in the pick slip generation run, based on the pick slip selection criteria specified on the Streamlined Pick Slip Generation Screen for the selected pick slip generation template.

In this topic:

- Pick Print Eligibility Screen
- Pick Print Eligibility Error Reasons

For more information: See:

- Preparing Orders for Pick Slip Generation for more information on when the system creates pre-generated picks for an order.
- Streamlined Pick Slip Generation (WSPS) for more information on generating pick slips based on the criteria defined for a pick slip generation template.

Pick Print Eligibility Screen

Use this screen to enter the order and ship to number you wish the system to evaluate for pick print eligibility when running Streamlined Pick Slip Generation (WSPS) for the selected pick slip generation template.

How to display this screen: Enter WPPE in the *Fast path* field at the top of any menu or select Pick Print Eligibility from a menu.

Field	Description
Order #	The order number and ship to number the system will evaluate for pick print eligibility. The order number is validated against the Order Header table. The order ship to number is validated against the Order Ship To table. To be eligible for pick print, the order and order ship to must be in an Open status and not locked by a user. *Order #: Numeric, 8 positions; required.* *Ship to #: Numeric, 3 positions; required.*
Pick Gen Template	The pick slip generation template from Streamlined Pick Slip Generation (WSPS) the system will use to determine if the pre-generated picks for the specified order will print. *Required.*

Instructions:

1. Enter the order number and order ship to number you wish to evaluate for pick print eligibility. If you leave the *Ship to* blank, the system defaults a ship to number of 1.
2. Select the pick slip generation template you wish to use to print picks for the order.
3. Select OK.

The system:

- If a pick exists for the order that is in a status other than G Generated No Authorization, H Generated Has Authorization, or V Void, the system displays the error `Pick already printed for order`.

> **Note:**
>
> The system displays this error even if other picks exist for the order that ARE in a G, H, or V status which could be eligible for pick slip generation. You must process the printed pick through Billing before the system evaluates the other picks for the order.

- If picks do not exist for the order, the system determines if the order is eligible for pick slip preparation.
  - If the order is not eligible for pick slip preparation, the system displays an error message indicating the order is not eligible for Streamlined Pick Slip Generation (WSPS) because a pre-generated pick does not exist for the order; see Pick Slip Preparation Errors.
  - If the order is eligible for pick slip preparation, the system submits the Pick Gen Refresh periodic function to create pre-generated picks for the order and continues to the next step. See Selecting Order Lines for Pick Slip Preparation and Applying Pick Slip Preparation to an Order for more information on when an order is eligible for pick slip preparation and the updates that occur.
- If a pre-generated pick exists for the order, the system determines if the pick will print using the selected pick slip generation template.
  - If picks for the order will not print using the selected pick slip generation template, the system displays an error message indicating the order is not eligible for Streamlined Pick Slip Generation (WSPS) because it does not meet the criteria defined for the selected pick slip generation template; see Pick Errors.
  - If at least one of the picks for the order will print using the selected pick slip generation template, the system displays the message `Order meets criteria`. However, if a *Maximum number of picks* has been defined for the pick slip generation template which could prevent the pick from being selected for print, the system displays the message `Pick eligible but Max # of Picks limit exists`.

> **Note:**
>
> - The system displays the first error encountered for the order; other errors may exist on the order which could prevent the order from being included in the pick slip generation run. Correct the error and run Pick Print Eligibility again to determine if there are any other reasons the order would not be included in the pick slip generation run.
> - If one of the picks for the order is eligible for Streamlined Pick Slip Generation (WSPS) using the selected pick slip generation template, the system considers the order eligible for pick slip generation, even if other picks for the order will not print. Run pick slip generation for the eligible pick and then run Pick Print Eligibility again to determine why other picks for the order are not eligible for pick slip generation.

Pick Print Eligibility Error Reasons

> **Note:**
>
> The pick print eligibility error reasons are system delivered data that displays in the default language selected during installation of Order Administration; see Regional Settings.

Error Message	Reason for Error
General Errors	
Pick already printed for order	A pick exists for the order that is in a status other than: • G Generated No Authorization • H Generated Has Authorization • V Void
Reason could not be determined	A reason other than the reasons listed in this chart is preventing the system from printing a pick for the selected order using the selected pick slip generation template. Contact your Order Administration representative to determine the reason for the error.
Pick Slip Preparation Errors	The system displays one of the error reasons below if pre-generated picks do not exist for the order and the order is not eligible for pick slip preparation.
Order Header is in wrong status	Pre-generated picks do not exist for the order because the Order Header is not in an Open status.
Order on hold	Pre-generated picks do not exist for the order because the status of the Order Header is H Held.
Order Header is quote	Pre-generated picks do not exist for the order because the status of the Order Header is Q Quote.
Order Header is currently locked by X	Pre-generated picks do not exist for the order because the order is locked by the specified user ID.
Order Ship To is in wrong status	Pre-generated picks do not exist for the order because the Order Ship To is not in an Open status.
Order Ship To on hold	Pre-generated picks do not exist for the order because the status of the Order Ship To is H Held.
Order is flagged as ship complete	Pre-generated picks do not exist for the order because the order is flagged as a ship complete order; see Selecting Order Lines for Pick Slip Preparation for more information on when an order is eligible for pick slip preparation.
Order does not have any open order details	Pre-generated picks do not exist for the order because the order does not have any order detail lines that are in an Open status; see Selecting Order Lines for Pick Slip Preparation for more information on when an order is eligible for pick slip preparation.
Order has a future arrival date	Pre-generated picks do not exist for the order because the *Arrival date* for the reserved, open order line(s) is a future arrival date. The system uses the arrival date defined for the order line or the order ship to if not defined at the line level; see Arrival Date Calculation.
Cancel date has been exceeded	Pre-generated picks do not exist for the order because the cancel date defined for the Order Ship To falls within the time it takes to process and fulfill the pick slip; see Cancel Date Calculation.

Error Message	Reason for Error
Order contains back ordered line(s)	Pre-generated picks do not exist for the order because the lines on the order are backordered; see Selecting Order Lines for Pick Slip Preparation for more information on when an order is eligible for pick slip preparation.
Order is coordinate grouped	Pre-generated picks do not exist for the order because the lines on the order are coordinate grouped together and one or more of the lines is not eligible for pick slip preparation; see Selecting Order Lines for Pick Slip Preparation for more information on when an order is eligible for pick slip preparation.
Line # 999 has a quantity remaining of 0	Pre-generated picks do not exist for the order because it contains a reserved order line with a quantity remaining equal to or less than 0.
Line # 999 has a quantity remaining that is > the quantity reserved	Pre-generated picks do not exist for the order because it contains a reserved order line with a quantity remaining that is greater than the quantity reserved.
Line # 999 has a quantity printed on reserved order line that is > the order detail reserved	Pre-generated picks do not exist for the order because it contains a reserved order line with a quantity printed that is greater than the quantity reserved on the order detail line.
Pick Errors	The system displays one of the error reasons below if a pre-generated pick exists for the order, but it will not print using the selected pick slip generation template.
Cancel date has been exceeded	A pre-generated pick exists for the order, but the cancel date defined for the Order Ship To falls within the time it takes to process and fulfill the pick slip; see Cancel Date Calculation.
Order does not meet criteria	A pre-generated pick exists for the order, but the pre-generated pick does not meet the criteria defined for the selected pick slip generation template.

Unlock Pick Slip (MUPI)

Purpose: Use this option to unlock a pick slip. A pick slip is locked if the *In Use By User* field in the Pick Control Header table is not blank. This situation might occur if, for example, a user's browser window closed during pick slip maintenance. Until you unlock the pick slip, you cannot work with it.

Unlock Pick Slip Screen

How to display this screen: Enter MUPI in the *Fast path* field at the top of any menu, or select Unlock Pick Slip from a menu.

Field	Description
Pick Number	Enter a valid pick control number identifying a pick slip that is currently locked. You cannot prompt on this field. *Numeric, 7 positions; required.* **When you enter the number of a locked pick slip, the screen displays the following information:**

Field	Description
Status	The pick slip's current status. Valid statuses are: • M = Manifest Submission • blank = Open • R = Reprinted *Alphanumeric, 1 position; display-only.*
Entered by	The ID that identifies the user who generated the pick slip. *Alphanumeric, 10 positions; display-only.*
Customer	The name of the customer associated with the pick slip. *Alphanumeric, 30 positions; display-only.*

Completing this screen:

1. Enter a number identifying a pick slip that is currently locked. If your entry is valid, the remaining fields on the screen display information about the pick slip, and a message indicates the pick slip will be unlocked.
2. Select OK. The system:
   - clears the *In Use By User* field in the Pick Control Header table for the pick slip.
   - deletes any records in the Carton Content table associated with the pick slip.

Processing Drop Ship Orders by Batch (MDSB)

Overview: Use Process Drop Ship Orders by Batch to review the number of drop ship orders available for processing for each vendor and to limit the number of drop ship orders that are processed for each vendor. Process Drop Ship Orders by Batch provides an alternative method for generating drop ship picks in addition to the Selecting Vendors for Drop Ship Processing (MDSP) menu option.

> **Note:**
>
> You can use Process Drop Ship Orders by Batch to generate drop ship pick slips only; this menu option does not generate drop ship purchase orders. See Selecting Vendors for Drop Ship Processing (MDSP) for information on generating drop ship purchase orders.

The Process Drop Ship Orders by Batch screen displays vendors and the number of drop ship picks that are available to generate for each vendor. At this screen, you can define how many picks you wish to print for a vendor and the batch size for the picks that you print.

To review the number of drop ship orders available for processing for each vendor, you must run the Update Available Picks Batch Program.

In this topic:

- Update Available Picks Batch Program
- Generate Drop Ship Picks by Batch Program

- Process Drop Ship Orders by Batch Screen

Update Available Picks Batch Program

Select Update Avail Picks at the Process Drop Ship Orders by Batch Screen to submit a batch program that updates the number of available picks for drop ship pick generation.

The Update Available Picks batch program evaluates the number of open drop ship orders and updates the Avail picks field and the Last update field for the vendor.

> **Note:**
>
> An open drop ship order is an order that is in open status and includes a drop ship order detail line in open status. An order that is on hold, or an order that is open but includes a drop ship order detail line that is on hold, is not included by the Update Available Picks batch program.

The Update Available Picks batch program:

- reviews each open order detail line to determine if the item on the line is a drop ship item.
- if the item is a drop ship item, identifies the vendor associated with the item.
- uses the Allow Only Single Line on Drop Ship Picks (C82) system control value to determine the number of picks eligible for generation for the vendor.
- updates the Avail picks field and the Last update field for the vendor, and displays the values on the Process Drop Ship Orders by Batch Screen.
- updates the # picks to release field with the value in the Avail picks field.

The Process Drop Ship Orders by Batch Screen continues to display the calculated number of available picks until you run the Update Available Picks batch program again, or you run the Generate Drop Ship Picks by Batch Program.

Example: The Allow Only Single Line on Drop Ship Pick (C82) system control value controls whether drop ship pick slips are limited to printing one detail line (item) per pick slip. The program uses this system control value to determine the number of picks that are available to generate for the vendor.

Allow Only Single Line on Drop Ship Pick (C82) **system control value is unselected**

Question	Answer
More than 1 drop ship item on the order?	Each drop ship item on an order that is associated with the same vendor represents 1 pick for that vendor. Example: You order 3 drop ship items and they are all associated with vendor 2398. Results: 1 drop ship pick prints.
Different vendors for the drop ship items on the order?	Each drop ship item on an order that is associated with a different vendor represents 1 pick for each vendor. Example: You order 6 drop ship items: 3 of drop ship item 1 (vendor 2398), 2 of drop ship item 2 (vendor 2499), and 1 of drop ship item 3 (vendor 2501). Results: 1 pick prints for vendor 2398, 1 pick prints for vendor 2499, and 1 pick prints for vendor 2501.

Question	Answer
Different ship to customers for the drop ship items on the order?	Each drop ship item on the order that is shipping to a different ship-to customer represents a separate pick for each vendor. Example: You order 6 drop ship items for ship-to customer 1: 3 of drop ship item 1 (vendor 2398), 2 of drop ship item 2 (vendor 2499), and 1 of drop ship item 3 (vendor 2501) and you also order 3 drop ship items for ship-to customer 2: 2 of drop ship item 1 (vendor 2398) and 1 of drop ship item 2 (vendor 2499). Results: 2 picks print for vendor 2398, 2 picks print for vendor 2499, and 1 pick prints for vendor 2501.

Allow Only Single Line on Drop Ship Pick (C82) **system control value is selected**

Question	Answer
More than 1 drop ship item on the order?	Each drop ship item on an order that is associated with the same vendor represents a separate pick for that vendor. Example: You order 3 drop ship items and they are all associated with vendor 2398. Results: 3 drop ship picks print.
Different vendors for the drop ship items on the order?	Each drop ship item on an order that is associated with a different vendor represents 1 pick for each vendor. Example: You order 6 drop ship items: 3 of drop ship item 1 (vendor 2398), 2 of drop ship item 2 (vendor 2499), and 1 of drop ship item 3 (vendor 2501). Results: 3 picks print for vendor 2398, 2 picks print for vendor 2499, and 1 pick prints for vendor 2501.
Different ship to customers for the drop ship items on the order?	Each drop ship item on the order that is shipping to a different ship to customer represents a separate pick for each vendor. Example: You order 6 drop ship items for ship to customer 1: 3 of drop ship item 1 (vendor 2398), 2 of drop ship item 2 (vendor 2499), and 1 of drop ship item 3 (vendor 2501) and you also order 3 drop ship items for ship to customer 2: 2 of drop ship item 1 (vendor 2398) and 1 of drop ship item 2 (vendor 2499). Results: 5 picks print for vendor 2398, 3 picks print for vendor 2499, and 1 pick prints for vendor 2501.

Generate Drop Ship Picks by Batch Program

Select Submit at the Process Drop Ship Orders by Batch Screen to submit a batch program that generates drop ship picks based on the number of picks to release and the batch size you defined for each vendor.

The Generate Drop Ship Picks by Batch program:

- reviews each open order detail line to determine if the item on the order line is a drop ship item.
- if the item is a drop ship item, identifies the vendor associated with the item.
- uses the # picks to release field for each vendor to determine how many picks to generate.

- processes credit card authorizations on the drop ship orders, if needed. Any orders that are declined for authorization are not used in the batch size calculation, and picks are not generated for the orders; see Using the Credit Card Authorization Interface.
- creates a batch of picks based on the Batch size and the # picks to release fields defined for the vendor. If the # picks to release is greater than the Avail picks, the program uses the Avail picks to determine the total number of picks to generate.
- runs the Update Available Picks Batch Program to refresh the Process Drop Ship Orders by Batch Screen with updated available drop ship pick information. If all picks are generated, the screen will be blank.

Print program: The system uses the Drop Ship Pick Print Program (E92). If this system control value is blank, the system uses the Pick Printing Program (C37). If the Create Generic Pick Download Triggers (I31) system control value is selected, the system also generates the Pick Message from Order Administration (CWPickOut).

For more information see the Order Administration Web Services Guide on https://support.oracle.com My Oracle Support (ID 2953017.1).

Example:

Vendor	Available Picks	# Picks to Release	Batch Size	Drop Ship Batches Generated
2398	98	20	5	4 drop ship batches are generated containing 5 picks each.
2499	24	28	5	5 drop ship batches are generated: 4 batches containing 5 picks each, and 1 batch containing 4 picks.
2501	9	blank	5	No picks are generated since the # of picks to release is 0.
2603	25	10	15	1 drop ship batch is generated containing 10 picks.

Reports generated:

- Vendor Drop Ship Worksheet (Produced whenever you run drop ship processing.)
- Drop Ship Pick Slip/Invoice (Always produced for drop ship pick slips.)
- Declined Drop Ships (Produced whenever you run drop ship processing.)
- Credit Card Authorization Listing (Produced for drop ship orders requiring credit card authorization.)
- Address Verification Response List (Produced for drop ship orders requiring credit card authorization and AVS verification.)

Bypassing printable pick slips not available: Even if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected, the Process Drop Ship Orders by Batch option still creates printable pick slips for eligible vendors. This system control value controls the generation of printable pick slips only when you use the Streamlined Pick Slip Generation (WSPS) option.

Process Drop Ship Orders by Batch Screen

Purpose: This screen displays vendors that have open, unshipped drop ship orders available for processing. At this screen, you can define the batch size of the picks processed for each vendor and the number of drop ship orders you would like to release for processing.

> **Note:**
>
> No information displays when you first advance to the Process Drop Ship Orders by Batch screen. To display vendors that have drop ship orders that are available for processing, you must select Update Avail Picks to run the Update Available Picks Batch Program.

How to display this screen: Enter MDSB in the *Fast path* field at the top of any menu or select Drop Ship Orders by Batch from a menu.

Field	Description
Fax picks to vendors	Indicates whether to fax the drop ship pick slips. This option is not currently implemented.
Last update	The last date when you submitted the Update Available Picks Batch Program. *Numeric, 6 positions (in user date format); display-only.*
Vendor #	A unique number to identify a vendor that has drop ship orders available for processing. The system displays vendors on this screen only if they have open drop ship orders and have the *Drop ship pick* field selected. Vendor codes are defined in and validated against the Vendor table; see Working with Vendors (WVEN). *Numeric, 7 positions; optional.*
Name	The name of the vendor that has open drop ship orders. *Alphanumeric, 30 positions; optional.*
Avail picks	The number of available drop ship picks that can be generated for the vendor. Calculated when you submit the Update Available Picks Batch Program. The system clears this field when you submit the Generate Drop Ship Picks by Batch Program. *Numeric, 9 positions; display-only.*
# picks to release	The number of available picks to release for drop ship pick batch generation. Leave this field blank if you do not wish to generate drop ship picks for the vendor. *Numeric, 9 positions; optional.*

Field	Description
Batch size	The number of picks to include in a drop ship batch for a specified vendor before creating a new batch. Example: Batch size = 2 # of picks to release = 5 In this situation, the system generates 3 batches: Batch 1 has 2 picks Batch 2 has 2 picks Batch 3 has 1 pick The vendor's *Drop ship batch size* defaults, but you can override it. If you override the batch size on this screen, the system does not update the *Drop ship batch size* field for the vendor. *Numeric, 7 positions; required.*

Screen Option	Procedure
Submit a batch program to update the number of available picks	Select Update Avail Picks to submit the Update Available Picks Batch Program. A message indicates that the batch program has been submitted: `Job 431745/UPD_#PCK submitted.`
Submit a batch program to generate the drop ship picks	Select Submit to submit the Generate Drop Ship Picks by Batch Program. A message indicates that the batch program has been submitted: `Job 431746/DROP_SHIP submitted.`

Printing the Carryover Report (PCOR)

Purpose: Use this screen to generate the Carryover Report.

The Carryover report lists unconfirmed pick slips generated on or before a specified date. Picks with a status of Open, Manifest Submission, CarryOver, Packed (packed), or Reprinted are included.

Print Carryover Report Screen

Use this screen to generate the Carryover Report.

How to display this screen: Enter PCOR in the *Fast path* field or select Print Carryover Report from a menu.

Field	Description
Pick printed on or before...	The latest print date to include on the Carryover Report. The report lists pick slips printed on or before this date. The current date defaults, but you can override it. *Numeric, 6 positions (in user date format); required.*

Screen Option	Procedure
Submit the CARRYOVER job to generate the Carryover reports	Select Submit. The system generates the Carryover Report.

Confirming and Billing Shipments

Topics in this part:

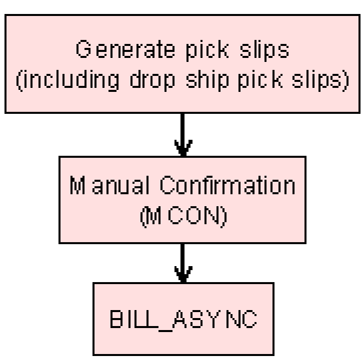
- Manually Confirming Shipments (MCON) describes how to confirm shipments manually, or interactively, using the pick control number, billing batch number (without exceptions), and billing batch number (with exceptions).
- Reprinting and Voiding Pick Slips (WVRP or WSVP) explains how to reprint and void a single pick slip or a range of pick slips.
- Void Pick Batch (WSVP)
- Printing the Fill Rate Reports (PFRR) provides report samples and descriptions of the Fill Rate, Shipment Summary, and Backorder Summary reports.

Manually Confirming Shipments (MCON)

Purpose: Use the Confirm Shipments menu option to confirm the shipment of items on pick slips or drop ship pick slips by pick control number or by billing batch number. You might use manual confirmation for international shipments.

Overview: Confirmation is the process of identifying packages or items as shipped and recording essential information for reporting and tracking purposes. The manual confirmation function is used for manual billing and drop ship items.

This topic describes manual confirmation. Manual confirmation provides the opportunity to confirm shipments interactively or by batch. Interactive confirmation is driven by the pick control number, whereas batch confirmation is driven by the billing batch number (with or without exceptions).



Confirming drop ship pick slips: You can also use this menu option to confirm drop ship pick slips, once your drop ship vendor has informed you that the orders have been shipped. You can confirm drop ship pick slips either by billing batch number or by pick control number.

When you process drop ship pick slips using the Selecting Vendors for Drop Ship Processing (MDSP) menu option, the system produces a pick slip/invoice which lists the billing batch number. If you want to confirm by pick control number, you must display picks through standard order inquiry (Select Options/Display picks), and note the pick control number for each order.

Confirming pick slips containing a stored value card item: When you confirm a pick slip containing a stored value card item, the system verifies that the stored value card is assigned a number. If the stored value card is not assigned a number, the system does not allow you to confirm the pick slip or change the status of the pick to carryover and displays an error message: `All stored value card numbers must be entered before accepting`. You must assign a number to the stored value card before you can confirm the associated pick slip. See Assigning Numbers to Physical Stored Value Cards.

In this topic:

Interactive Confirmation Screen

Purpose: Use this screen to specify the shipping warehouse, current billing date, and whether you are going to confirm shipments by the pick control number or by the billing batch number.

How to display this screen: Enter MCON in the *Fast path* field at the top of any menu or select Confirm Shipment from a menu.

Field	Description
Shipping warehouse	A code that represents the warehouse from which you are shipping the merchandise. Warehouse codes are defined in and validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS). *Numeric, 3 positions; required.*
Current billing date	The date that you want to confirm this billing run. The current date defaults, but you can override it. *Numeric, 6 positions (in user date format); required.*

Field	Description
Bill by batch #	Indicates whether you want to bill by batch or pick control number. Valid values are: • Selected = Bill by the batch number assigned by the system when you generated pick slips or drop ship pick slips. • Unselected (default) = Bill by the pick control number assigned by the system when you generated pick slips or drop ship pick slips.

Completing this screen: If you selected the *Bill by batch number* field, you advance to the Confirm by Pick Batch Number Screen. If you left the *Bill by batch number* field blank, you advance to the Confirm by Pick Control Number Screen.

Confirm by Pick Control Number Screen

Purpose: The system assigns a pick control number to each pick slip. Use this screen to confirm a shipment by the pick control number.

How to display this screen: Complete the Interactive Confirmation Screen without selecting the *Bill by batch number* field.

Field	Description
Warehouse	A code that represents the shipping warehouse. Warehouse codes are defined in and validated against the Warehouse table. *Numeric, 3 positions; display-only.*
Billing date	The date reflects when the order is shipped. The value defaults from the previous screen. *Numeric, 6 positions (in user date format); display-only.*
Control # (Pick control number)	Enter the pick control number that you are confirming. **Note:** You cannot confirm a pick control number that is in a pre-printed status (G Generated No Authorization or H Generated Has Authorization); see Creating Pre-Generated Picks. *Numeric, 7 positions; required.*
The following fields are displayed when you enter a valid pick control number in an eligible status.	

Field	Description
Pick status	The description of the pick slip's status. Possible statuses are: • Open • Submitted to async • Billing pending • Confirmed • Declined authorization • Async processing error • Manifest submission • CarryOver • Packed • Reprinted • Suspended • Void • Waiting for authorization • Authorized *Display-only.*
Order #	The order number you wish to confirm. *Numeric, 8 positions; display-only, assigned by the system.*
Ship-to number (Unlabeled field)	A hyphen (-) separates this field from the Order # field. Indicates the number of shipping addresses on the order. *Numeric, 3 positions; display-only.*
Ship to	The name and address of the customer to receive the order. *Alphanumeric, 41 positions (name), 32 positions (address), 10 positions (apartment), 40 positions (city/st/postal/cntry); display-only.*
Ship via	A code that represents the shipper. Ship via codes are defined in and validated against the Ship Via table; see Working with Ship Via Codes (WVIA). The system writes an S (shipment) order transaction history message (Order History in order maintenance and inquiry) if the ship via is changed. *Numeric, 2 positions; required.*
Meter charges	The freight charges associated with shipping this order. The system writes an S (shipment) order transaction history message (Order History in order maintenance and inquiry) if the meter charge is changed. If you enter multiple tracking numbers, the meter charges are associated with the first tracking number entered. *Numeric, 8 positions; optional.*

Field	Description
Tracking #	The shipment tracking number, if any, to save in the Manifest Upload Audit table. The number is then eligible to include in the: • *Outbound Email XML Message (CWEmailOut)* or shipment confirmation email • *Detailed Order Inquiry Response XML Message (CWORDEROUT)* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Also, this number is displayed on the: • Display Package Information Screen • Third Streamlined Order Inquiry Screen (Order Summary) **Note:** The two screens above can provide a link to the shipper's web site to review tracking history. • Select Orders For Return Authorization Screen • Display Order History Screen **Multiple tracking numbers?** Optionally, you can select Add'l Tracking #s to open the Enter Additional Tracking Numbers window. You can enter up to 10 tracking numbers at this window, plus the tracking number at the Confirm by Pick Control Number Screen, for a maximum of 11 numbers, regardless of the number of pick control labels that were originally generated. **Note:** Once you confirm shipment as described below, you cannot enter any additional tracking numbers for the pick slip. *Alphanumeric, 30 positions; optional.*

Screen Option	Procedure
Change the date	Select Change Date to activate the date field. Enter the new date.
Carry over	Select Carry over to change the status of the pick slip to carryover.

Screen Option	Procedure
Enter additional tracking numbers	Select Add'l Tracking #s to open the Enter Additional Tracking Numbers window. You can enter up to 10 tracking numbers at this window, plus the tracking number at the Confirm by Pick Control Number Screen, for a maximum of 11 numbers, regardless of the number of pick control labels that were originally generated. **Note:** This option is available only after you have entered a valid pick control number.
Work with details	Select Work with Details to advance to the Confirm Pick Control Details Screen. This option is available only after entering a pick control number.

Instructions: To confirm shipment by pick control number.

1. Enter the pick control number is the one you want to confirm in the Control # (Pick control number) field. The additional fields, described above, are displayed in the bottom portion of the screen.
2. Optionally, change the Ship via.
3. Optionally, enter Meter charges.
4. Optionally, enter a Tracking #. You can also select Add'l Tracking #s to open the Enter Additional Tracking Numbers window, where you can enter up to 10 tracking numbers, for a maximum of 11 numbers, regardless of the number of pick control labels that were originally generated.
5. Select OK to confirm the pick control number. A confirmation window opens. Select Accept to accept the confirmation; otherwise, select Reject.
6. When you confirm the shipment, the screen displays a message: `Pick submitted to async job!`

> **Note:**
>
> When you confirm the shipment, all labels associated with the pick control number are confirmed. You cannot confirm any additional shipments for the pick control number.

For more information: See Updates During Background Processing.

Confirm Pick Control Details Screen

Purpose: This screen allows you to display pick control details at the line level.

How to display this screen: Select Work with details at the Confirm by Pick Control Number Screen.

Field	Description
Control # (Pick control number)	The control number assigned to a pick slip. *Numeric, 7 positions; display-only.*
Pick status (Unlabeled field to the left of the Control number field)	The description of the pick slip's status. Status options: • Open • Submitted to async • Billing pending • Confirmed • Declined authorization • Async processing error • Manifest submission • CarryOver • Packed • Reprinted • Suspended • Void • Waiting for authorization • Authorized *Display-only.*
Order #	A unique number to identify an order. *Numeric, 8 positions; display-only, assigned by the system.*
Ship-to number (Unlabeled field to the right of the order number)	The number of the shipping address on the order. *Numeric, 3 positions; display-only.*
Ship to	The name of the customer to receive the order. *Alphanumeric, 41 positions (name); display-only.*
Line #	The line number on the pick slip. *Numeric, 3 positions; display-only.*
Item	A code that represents a unit of inventory. Item codes are defined in and validated against the Item table. *Alphanumeric, 12 positions; display-only.*
SKU	The unique characteristics of an item, such as its color and size. *Alphanumeric, three 4-position fields; display-only.*
Printed	The quantity of the item printed on the pick slip. *Numeric, 5 positions; display-only.*
Packed	The quantity of the item packed and shipping. Not currently implemented. *Numeric, 5 positions; display-only.*
Sts (Status)	The status of the item. Valid values are: • C = Cancel • H = Hold • Blank = Open *Alphanumeric, 1 position; display-only.*

Confirm by Pick Batch Number Screen

Purpose: Use this screen to confirm an entire batch of picks in a single entry. The system assigns the billing batch number when you generate pick slips.

How to display this screen: Select the *Bill by batch number* field on the Interactive Confirmation Screen.

Field	Description
Billing batch #	The billing batch number containing the pick slips you are confirming. *Numeric, 7 positions; required.*
Exceptions	Indicates if there are pick slips in the batch that are not shipping at this time. Valid values are: • Selected = Exclude exceptions from the billing run. You advance to the Work with Batch Exceptions screen. • Unselected = There are no exceptions in the billing run. You advance to the Batch Confirmation pop-up window.
Ship via	The shipper assigned to this batch of pick slips. Ship via codes are defined in and validated against the Ship Via table. The system writes an S (shipment) order transaction history message (Order History in order maintenance and inquiry) if you enter a ship via in this field. *Numeric, 2 positions; required.*

Field	Description
Meter charge	The total freight charges associated with shipping all pick slips in this batch. The system writes an S (shipment) order transaction history message (Order History in order maintenance and inquiry) if you enter a meter charge in this field. The system uses the following calculation to determine the meter charge for each unit in the batch: `meter charge / total units in batch = meter charge per unit` The system uses the following calculation to determine the meter charge for each pick slip in the batch: `unit meter charge x number of units on pick = meter charge for each pick slip` Example: batch 203 includes 25 pick slips the total meter charge for the batch is 150.00 the total units in the batch is 50 units per pick slip is 2 `150.00 (meter charge) / 50 (total units in batch) = 3.00 (meter charge per unit)` `3.00 (unit meter charge) x 2 (units per pick slip) = 6.00 (meter charge for each pick slip)` Example: batch 204 includes 25 pick slips the total meter charge for the batch is 150.00 the total units in the batch is 50 units for pick slips 1-24 is 1 units for pick slip 25 is 26 `150.00 (meter charge) / 50 (total units in batch) = 3.00 (meter charge per unit)` `3.00 (unit meter charge) x 1 (number of units on pick slip) = 3.00 (meter charge for pick slips 1-24)` `3.00 (unit meter charge) x 26 (number of units on pick slip) = 78.00 (meter charge for pick slip 25)` You can review summary information for a batch of pick slips such as per unit meter charge and total picks confirmed on the Batch Confirmed Report. *Numeric, 8 positions; optional.*

Completing this screen: If you selected the *Exceptions* field, you advance to the Work with Batch Exceptions Screen (Confirming by Billing Batch Number with Exceptions).If you unselected the *Exceptions* field, you advance to the Batch Confirmation pop-up window. See Confirming by Billing Batch Number (without Exceptions).

Work with Batch Exceptions Screen (Confirming by Billing Batch Number with Exceptions)

Purpose: Exceptions are pick control numbers in the batch that did not ship or that you wish to exclude from the batch (for example, the pick slip includes a different ship via than the rest of the pick slips in the batch). Use this screen to exclude these control numbers from the billing run.

How to display this screen: Select the *Exceptions* field on the Confirm by Pick Batch Number Screen.

Field	Description
Billing batch #	A number to identify a batch of pick slips. *Numeric, 7 positions; display-only, assigned by the system.*
Billing date	The billing date for this batch of picks. *Numeric, 6 positions (in user date format); display-only.*
Cntrl # (Pick control number)	The control number assigned to a pick slip. Type a control number to display pick slips in that batch in numeric sequence beginning with your entry. *Numeric, 7 positions; required.*
Ship to	The name of the customer to receive the order. *Alphanumeric, 41 positions; display-only.*
Pick status	The description of the pick slip's status. Valid values are: • Open • Submitted to async • Billing pending • Confirmed • Declined authorization • Async processing error • Manifest submission • CarryOver • Packed • Reprinted • Suspended • Void • Waiting for authorization • Authorized *Display-only.*
Whs (Warehouse)	A code to identify the warehouse confirming the shipment. Warehouse codes are defined in and validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS). *Numeric, 3 positions; display-only.*

Screen Option	Procedure
Void the pick	Select Void Pick for a pick slip to advance to the Reprint/Void Pick Slips Screen (Reprinting/Voiding by Pick Control Number).

Screen Option	Procedure
Confirm the pick	Select Confirm for a pick slip to confirm the pick slip. **Note:** If the pick is a carryover its status changes to Open when you select this option.
Carry over	Select Carryover for a pick slip to change the status of the pick to Carryover.
Work with details	Select Work with Details for a pick slip to advance to the Confirm Pick Control Details Screen.
Accept the batch	Select Accept to accept the batch. See Accepting and Rejecting Batches (with Exceptions).
Reject the batch	Select Reject to reject the batch. The system displays the Confirm Reject Request pop-up window. See Accepting and Rejecting Batches (with Exceptions).

Accepting and Rejecting Batches (with Exceptions)

Purpose: To complete confirming by billing batch number (with exceptions), you must accept or reject the batch.

To accept a batch: You can accept a batch by selecting Accept at the Work with Batch Exceptions Screen (Confirming by Billing Batch Number with Exceptions). The system displays the Batch Confirmation pop-up window.

Batch Confirmation Pop-up Window

This window indicates that you are about to submit the batch for confirmation. Select OK to accept the batch confirmation and exit the screen; otherwise, select Exit to cancel the batch confirmation and return to the previous screen.

Confirming the batch causes the system to submit the batch job (BCH_CONFRM) for processing, and create the Batch Confirmed Report. Any pick slip that you marked for void or carry over is excluded from the billing run.

To reject a batch: You can reject a batch by selecting Reject at the Work with Batch Exceptions Screen (Confirming by Billing Batch Number with Exceptions). The Confirm Delete pop-up window displays.

Select OK to confirm the delete or select Exit to cancel and return to the previous screen.

Important:

If you confirm the rejection, any changes that you indicated on the Work with Batch Exceptions Screen (Confirming by Billing Batch Number with Exceptions) are not executed by the system. Pick slips remain in the status they were in when you entered the Work with Batch Exceptions screen.

Confirming by Billing Batch Number (without Exceptions)

Purpose: Use this window to confirm a batch of pick control numbers for billing without exceptions.

How to display this window: Deselect the Exceptions field at the Confirm by Pick Batch Number Screen.

To confirm the batch: Select OK to confirm at the confirmation window to confirm the batch; otherwise, select Exit to cancel the confirmation and return to the Confirm by Pick Batch Number screen.

Confirming the batch causes the system to return to the previous screen and to submit the batch job (BCH_CONFRM) for processing, and to create the Batch Confirmed Report.

Reprinting and Voiding Pick Slips (WVRP or WSVP)

Purpose: A pick might need to be voided because:

- the original pick was destroyed
- you need to change a shipper
- you found an error on the original pick slip
- the customer cancels the order
- you need to de-allocate or unreserve stock

Options when voiding: Your options include voiding the pick slip and:

- leaving the order line(s) reserved
- unreserving the order line(s)
- automatically reprinting
- putting the order on hold
- canceling the order

Not all options are available through all screens.

Secured features: The ability to reprint and void pick slips through the Void/Reprint Picks (WVRP) menu option is controlled by the Change Pick Slips (A32) and Reprint Pick Slips (A33) secured features; however, these features do not control the Void Pick Batch (WSVP) menu option.

Drop ship pick slip/invoices: You cannot use this menu option to void or reprint a Drop Ship Pick Slip/Invoice. The system deletes a drop ship pick slip/invoice once the associated drop ship purchase order is closed or canceled and all IL Outbound Trigger records (WOIT) for the purchase order and drop ship pick slip/invoice are in an X Closed status.

If an invoice number is assigned: The Generate Invoice Number at Pick Gen (H80) and Generate Invoice # at Pick Gen without Address Match (K81) system control value controls whether to assign a pending invoice number at pick slip generation. If you reprint a pick slip that has a pending invoice number assigned, the system assigns a new pending invoice number for the new pick control number.

> **Note:**
>
> If you are using pick label tracking, you void all labels for a pick slip at once. You cannot void a pick slip if any of its labels have been confirmed.

Pick In API: You can also use the generic Pick In API to void or reprint pick slips. See the *Generic Pick In API (Shipments, Voids, and Backorders)* in the Web Services Guide on My Oracle Support (ID 2953017.1).for more information.

Status update to Order Orchestration? If the Create Separate Picks for Ship for Pickup Orders (L89) system control value is:

- unselected: Voiding a pick slip for a ship-for-pickup, retail pickup, or delivery order does not generate a status update to Order Orchestration and neither does reprinting the pick slip. Once you have created the order in Order Orchestration by initially generating the pick slip, Order Administration does not send another status update until you confirm shipment or cancel the order.
- selected: Voiding a pick slip for a regular (not special) ship-for-pickup order generates a status update to Order Orchestration to cancel the original order in Order Orchestration, and reprinting the pick slip generates a new order submission to Order Orchestration. However, regardless of the Create Separate Picks for Ship for Pickup Orders (L89) system control value, voiding a pick slip for a retail pickup or delivery order does not generate another status update until you confirm shipment or cancel the order.

See Ship-for-Pickup Orders and Retail Pickup (including Ship-for-Pickup) or Delivery Orders for overviews.

Bypassing printable pick slips not available: Even if the Bypass Creation of Pick Forms during WSPS Pick Generation (K55) system control value is selected, voiding and reprinting a pick slip still creates a printable pick slip. This system control value controls the generation of printable pick slips only when you use the Streamlined Pick Slip Generation (WSPS) option.

In this topic:

- Reprint/Void Pick Slips Screen (Selecting Reprint/Void Criteria) (WVRP)
  - Reprint/Void Pick Slips Screen (Reprinting/Voiding by Pick Control Number)
  - Reprint/Void Pick Slips by Batch Screen
  - Reprint/Void Pick Slips by Order Screen
- Display Pick Control Header (1 of 2) Screen
- Reprinting Pick Slips
- Voiding Pick Slips
- Work with Pick Control Detail Screen
  - Pick Control Details Screen (Displaying Pick Control Details)
- Freezing an Item
- Select a New Pick Location Screen
  - Select Item Location Screen

For more information: See Void Pick Batch (WSVP).

Reprint/Void Pick Slips Screen (Selecting Reprint/Void Criteria) (WVRP)

Purpose: Use this screen to enter the information about the pick slip(s) that controls which screen you advance to next. For example, enter:

- Pick control number or range of pick control numbers to advance to the Reprint/Void Pick Slips Screen (Reprinting/Voiding by Pick Control Number).
- Batch number and, optionally, Cart number to advance to the Reprint/Void Pick Slips by Batch Screen.
- Order number and, optionally, the Ship-to number or Order line number to advance to the Reprint/Void Pick Slips by Order Screen.

How to display this screen: Enter WVRP in the *Fast path* field at the top of any menu or select Reprint/Void Pick Slips from a menu.

Field	Description
Pick control # range	Optionally, enter a range of pick control numbers to advance to the Reprint/Void Pick Slips Screen (Reprinting/Voiding by Pick Control Number). *Numeric, 7 positions; optional.*
Batch #	Optionally, enter a batch number to display all pick slips in that billing batch. You advance to the Reprint/Void Pick Slips by Batch Screen. *Numeric, 7 positions; optional.*
Cart #	Optionally, enter a cart number if you also entered a *Batch #*. You advance to the Reprint/Void Pick Slips by Batch Screen, displaying all pick slips in that billing batch and cart. *Numeric, 7 positions; optional.*
Order #	Optionally, enter an order number to display all pick slips for that order. You advance to the Reprint/Void Pick Slips by Order Screen. *Numeric, 8 positions; optional.*
Order ship to #	Optionally, enter an order ship-to number if you also entered an *Order #*. You advance to the Reprint/Void Pick Slips by Order Screen, displaying all pick slips for that order and order ship-to. *Numeric, 3 positions; optional.*

Reprint/Void Pick Slips Screen (Reprinting/Voiding by Pick Control Number)

Purpose: This screen lists the pick slip information for a specific control number or a range of pick control numbers. You have the option to:

- for all displayed pick slips:
  - void and reprint all
  - void and optionally unreserve all, or leave the order line(s) reserved
- for individual pick slips:
  - work with pick control details
  - display pick control header information
  - void and leave the order line(s) reserved
  - void and reprint

- void and unreserve

How to display this screen: At the Reprint/Void Pick Slips Screen (Selecting Reprint/Void Criteria) (WVRP), enter a pick control number or range of pick control numbers.

Field	Description
Selected control # (Selected control number range)	The control number information that you entered at the previous screen. *Numeric, 7 positions; display-only.*
Fax drop ship picks	Indicates whether you want to fax drop ship picks to the vendor. This option is not currently implemented.
Control # (Pick control number)	A number to identify a pick slip. Enter a pick control number to display existing pick control numbers, beginning with your entry. *Numeric, 7 positions; optional.*
Batch # (Billing batch number)	A number to identify a batch of pick slips. *Numeric, 3 positions; display-only.*
Cart #	A number to identify the batch pick slip list assigned to a cart. *Numeric, 3 positions; display-only.*
Order #	A unique number to identify an order. *Numeric, 8 positions; display-only, assigned by the system.*
Printed (date/time)	The date and time that the pick slip was printed. *Date: numeric, 6 positions (in user date format); display-only.* *Time: numeric, 6 positions (HHMMSS format); display-only.*
Confirmed (date/time)	The date and time that the pick slip was confirmed. *Date: numeric, 6 positions (in user date format); display-only.* *Time: numeric, 6 positions (HHMMSS format); display-only.*
Status	The status of the pick slip. Valid values are: • Open • Submitted to async • Billing pending • Confirmed • Declined authorization • Async processing error • Manifest submission • CarryOver • Packed • Reprinted • Suspended • Void • Waiting for authorization • Authorized *Display-only.*

Screen Option	Procedure
Work with pick control details	Select Work with for a pick control number to advance to the Display Pick Control Header (1 of 2) Screen.
Void pick slips	Select Void for a pick control number to void the pick slip. See Voiding Pick Slips.
Display pick control header information	Select Display for a pick control number to advance to the Display Pick Control Header (1 of 2) Screen.
Reprint pick slips	Select Reprint for a pick control number to reprint the pick slip. See Reprinting Pick Slips.
Void/unreserve pick slips	Select Void/Unreserve to void the pick slip and unreserve the items. See Voiding Pick Slips.
Reprint all pick slips	Select Reprint All to reprint all pick slips. See Reprinting Pick Slips.
Void all pick slips	Select Void All to void all pick slips. See Voiding Pick Slips.

Reprint/Void Pick Slips by Batch Screen

Purpose: This screen lists the pick slip information for a specific batch number and cart number. You have the option to:

- for all displayed pick slips:
  - void and reprint all
  - void and optionally unreserve all, or leave the order line(s) reserved
- for individual pick slips:
  - work with pick control details
  - display pick control header information
  - void and leave the order line(s) reserved
  - void and reprint
  - void and unreserve

How to display this screen: At the Reprint/Void Pick Slips Screen (Selecting Reprint/Void Criteria) (WVRP), enter a Batch number and Cart number (or leave this field blank to select all cart numbers).

Field	Description
Selected batch #	The batch number that is carried over from the previous screen. *Numeric, 7 positions; display-only.*
Cart #	A number that represents the batch pick slip list that is assigned to each cart. *Numeric, 3 positions; display-only.*
Control # (Pick control number)	The pick control number. Enter a cart/control number to display pick slips beginning with the control number you entered. *Numeric, 7 positions; optional.*
Order #	A unique number assigned by the system to identify an order. Every order on the system is assigned an order number. *Numeric, 8 positions; display-only.*

Field	Description
Shp # (Ship-to number)	The number of shipping addresses for the order. The system assigns a sequential ship-to number to every order. The first ship-to address is assigned the number one. *Numeric, 3 positions; display-only.*
Printed (date/time)	The date and time that the pick slip was printed. *Date: numeric, 6 positions (in user date format); display-only.* *Time: numeric, 6 positions (HHMMSS format); display-only.*
Confirmed (date/time)	The date and time that the pick slip was confirmed. *Date: numeric, 6 positions (in user date format); display-only.* *Time: numeric, 6 positions (HHMMSS format); display-only.*
Status	The status of the pick slip. Valid values are: • Open • Submitted to async • Billing pending • Confirmed • Declined authorization • Async processing error • Manifest submission • CarryOver • Packed • Reprinted • Suspended • Void • Waiting for authorization • Authorized *Display-only.*

Screen Option	Procedure
Work with pick control details	Select Work with for a pick slip to advance to the Display Pick Control Header (1 of 2) Screen.
Void pick slips	Select Void for a pick control number to void the pick slip. See Voiding Pick Slips.
Display pick control header information	Select Display for a pick slip to advance to the Display Pick Control Header (1 of 2) Screen.
Reprint pick slips	Select Reprint for a pick slip to reprint the pick slip. See Reprinting Pick Slips.
Void/unreserve pick slips	Select Void/Unreserve to void the pick slip and unreserve the items. See Voiding Pick Slips.
Reprint all pick slips	Select Reprint All to reprint all pick slips. See Reprinting Pick Slips.
Void all pick slips	Select Void All to void all pick slips. See Voiding Pick Slips.

Reprint/Void Pick Slips by Order Screen

Purpose: Use this screen to work with, display, reprint, or void pick slips for a specific order number, order Ship-to number and order line number. You have the option to:

- for all displayed pick slips:
  - void and reprint all
  - void all and put the order(s) on hold
  - void all and cancel the order(s)
- for individual pick slips:
  - work with pick control details
  - display pick control header information
  - void and leave the order line(s) reserved
  - void and reprint
  - void and unreserve

How to display this screen:

- At the Reprint/Void Pick Slips Screen (Selecting Reprint/Void Criteria) (WVRP), enter an Order number, Order Ship-to number (or leave this field blank to select all ship-to numbers) and order line number (or leave this field blank to select all line numbers).
- Select Void/Reprint at the Picks Pending Window in order maintenance. This window opens in order maintenance when you attempt to cancel an order that has printed pick slips.

Field	Description
Ship # (Ship to number)	Indicates the number of shipping addresses for the order. *Numeric, 3 positions; optional.*
Control # (Pick control number)	Indicates the pick control numbers that you want to reprint or void pick slips for. *Numeric, 7 positions; optional.*
Batch # (Billing batch number)	A number that is assigned to each pick slip run. *Numeric, 3 positions; display-only.*
Cart #	A number that represents the batch pick slip list that is assigned to each cart. *Numeric, 3 positions; display-only.*
Printed (date/time)	The date and time that the pick slip was printed. *Date: numeric, 6 positions (in user date format); display-only.* *Time: numeric, 6 positions (HHMMSS format); display-only.*
Confirmed (date/time)	The date and time that the pick slip was confirmed. *Date: numeric, 6 positions (in user date format); display-only.* *Time: numeric, 6 positions (HHMMSS format); display-only.*

Field	Description
Status	The status of the pick slip. Valid values are: • Open • Submitted to async • Billing pending • Confirmed • Declined authorization • Async processing error • Manifest submission • CarryOver • Packed • Reprinted • Suspended • Void • Waiting for authorization • Authorized *Display-only.*

Screen Option	Procedure
Work with pick control details	Select Work with for a pick slip to advance to the Display Pick Control Header (1 of 2) Screen.
Void pick slips	Select Void for a pick slip to void the pick slip. See Voiding Pick Slips.
Display pick control header information	Select Display for a pick slip to advance to the Display Pick Control Header (1 of 2) Screen.
Reprint pick slips	Select Reprint for a pick slip to reprint the pick slip. See Reprinting Pick Slips.
Void/unreserve pick slips	Select Void/Unreserve to void the pick slip and unreserve the items. See Voiding Pick Slips.
Reprint all pick slips	Select Reprint All to reprint all pick slips. See Reprinting Pick Slips.
Void all pick slips and hold the order(s).	Select Void All/Hold Order to void all pick slips and hold the order(s). This option is available only if pick slips exist. See Voiding Pick Slips.
Void all pick slips and cancel the order(s).	Select Void All/Cancel Order. The system voids all pick slips and cancels the order(s). The system displays a pop-up window to confirm the cancellation. This option is available only if pick slips exist. See Voiding Pick Slips.

Display Pick Control Header (1 of 2) Screen

Purpose: Use this screen to review pick information including the control and billing batch numbers, pick status, generation type, date/time for last update, confirmation, printing, assigned to number of labels, cartons, zones, warehouse, and drop points.

How to display this screen: Select Display for a pick slip at any Reprint/Void Pick Slips screen or at the Display Pick Tickets for Order Screen.

Additional pick control header information: Select OK to advance to the Second Display Pick Control Header Screen.

For more information: See Displaying Pick Slip Generation Inquiry (DPSI) for more information on this screen and the additional screens available.

Reprinting Pick Slips

Purpose: Use the Reprint Pick Slips function to void the original pick slip and reprint another pick slip. You might want to use this feature if the quantity listed on the pick slip cannot be picked for one reason or another, or if the original pick slip was destroyed somehow.

The system automatically voids the original pick slip and reprints the pick slip with a new number. If the Generate Invoice Number at Pick Gen (H80) or Generate Invoice # at Pick Gen without Address Match (K81) system control value was selected, and an invoice number was assigned at pick slip generation, the system also assigns a new invoice number at this time. However, the system does not evaluate the order and customer to see if they meet the criteria that govern invoice number assignment at pick slip generation; a new invoice number is assigned only if there was already an invoice number in the table.

> **Note:**
>
> This option does not automatically reprint the Gift Acknowledgement for a gift order. See the Automatic Generation of Gift Acknowledgement (B92) system control value for more information.

How to reprint a single pick slip: Select Reprint for a pick slip at any Reprint/Void Pick Slip screen.

Error messages:

The system displays an error message similar to the following when you select Reprint for a pick slip that is in a billing pending status:

```
Pick cannot by voided/reprinted/changed in this status.
```

The system displays an error message similar to the following if a user is currently maintaining this pick slip:

```
Pick Control # 9999 is in use by user KLETENDRE.
```

How to reprint all pick slips: You can reprint all pick slips by selecting Reprint All at any Reprint/Void Pick Slip screen. The system reprints all the picks in the batch, except pick slips that are in a billing pending status.

Authorization error: The screen displays an error message similar to the following when you select Reprint All to reprint all pick slips if the Access to Void/Reprint All (A76) secured feature is set to *EXCLUDE:

```
User Not Authorized to Function.

=
```

When this secured feature is set to *EXCLUDE, the system still allows you to select Reprint for a specific pick slip in order to reprint it.

Sorting pick slips into separate PDF files:

- If you select the Reprint option for a pick slip, the system creates a separate pick slip PDF document based on warehouse, ship via priority, the Split Special Handling Picks (L44) system control value, and the `PICKS_IN_SPOOL_FILE` property in Working with Customer Properties (PROP).
- If you select the Reprint All option, the system does not create a separate pick slip PDF document based on warehouse, ship via priority, or the Split Special Handling Picks (L44) system control value. The system will create a separate pick slip PDF document based only on the `PICKS_IN_SPOOL_FILE` property in Working with Customer Properties (PROP).

See Sorting Pick Slips into Separate PDF Documents for more information.

Voiding Pick Slips

Purpose: The Void Pick Slips function in Reprinting and Voiding Pick Slips (WVRP or WSVP) enables you to void the original pick slip, which is similar to ripping up the pick slip. The system automatically voids the original pick slip and decreases the quantity printed.

You can also use the Void Pick Batch (WSVP) menu option to void an entire batch of pick slips if, for example, they were generated by mistake. This menu option simply voids the pick slips in the batch, without the option to reprint or unreserve the order lines or to hold or cancel the order.

Which pick statuses are eligible? Voiding a pick slip or a group of pick slips through any of the options available through Reprinting and Voiding Pick Slips (WVRP or WSVP) is possible only for pick slips that are not in a G Generated No Authorization, H Generated Has Authorization, A Submitted to Async or B Billing Pending status. The Void Pick Batch (WSVP) option also omits pick slips in these statuses, as well as those in C Confirmed and V Void statuses.

OROB unavailable error: The screen displays an error message such as `Cannot void pick - OROB unavailable` if:

- the order is a regular (not special) ship-for-pickup order, and
- the Create Separate Picks for Ship for Pickup Orders (L89) system control value is selected, and
- the system cannot communicate with Order Orchestration (for instance, the Order Orchestration application is not currently running)

This error message occurs because, in this situation, the system needs to send a cancellation status update when you void a pick slip. See Ship-for-Pickup Orders for background.

Updates at void: When you void a pick slip, the system updates the following tables based on the quantity on the voided pick slip:

- Item Location: subtracts the printed quantity
- Reserved Order Line: subtracts the printed quantity and updates the quantity remaining
- Order Detail: subtracts the printed quantity

It deletes the related records in the following tables:

- Pick Control Header

- Pick Control Detail
- Pick Control Header Extended
- Pick Control Label
- Pick Location

Pick slip preparation: When you void a pick slip, the system removes any pick slip preparation from the order and then reevaluates the order for pick slip preparation; see Preparing Orders for Pick Slip Generation.

Credit card payments: If the pick slip is associated with a credit card payment, it creates a record in the Void Auths table for the amount on the voided pick slip.

Order transaction history: The system writes an Order Transaction History message indicating that the pick slip was voided.

Pick download trigger: If the Create Generic Pick Download Triggers (I31) system control value is selected, the system also creates a PCH trigger record to generate a void request through the *Generic Pick Out API.*

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Tickler: If the Use Workflow Management (H96) system control value is selected, the system creates a VP tickler when you void pick slips subject to the criteria you have set up for the tickler event; however, voiding a batch of pick slips through the Void Pick Batch (WSVP) menu option does not create ticklers.

Notify Order Orchestration: If the order is a regular (not special) ship-for-pickup order, and the Create Separate Picks for Ship for Pickup Orders (L89) system control value is selected, the system sends a cancellation status update to Order Orchestration. See Ship-for-Pickup Orders for an overview.

Void and Unreserve a Single Pick Slip

Select Void/Unreserve for a pick slip record at any Reprint/Void Pick Slip screen.

Error message: The system displays an error message similar to the following if you select Void/Unreserve a pick slip that is in a billing pending status:

```
Pick cannot be voided/reprinted/changed in this status.
```

> **Note:**
>
> If you void a pick slip and all of the other pick slips for that order are in a billing pending status, the system automatically submits the picks to Billing.

See Voiding Pick Slips for information on the `Cannot void pick - OROB unavailable` error message.

Partial void? If you void a pick slip for a partial shipment on an order when one or more items is not available, the system tracks the amount of the void in the Void Auths table. Then, when the item is available and you generate a new pick slip, it will not be necessary to obtain a new authorization.

Void All Pick Slips (With or Without Unreserving)

Select Void All at the Reprint/Void Pick Slips Screen (Reprinting/Voiding by Pick Control Number) or the Reprint/Void Pick Slips by Batch Screen.

Error messages:

The screen displays an error message similar to the following when you select Void All to void all pick slips if a pick slip is in a billing pending status and other pick slips for that order still exist:

```
Pick 2146 is in Billing Hold status. Void not processed.
```

The system voids all of the pick slips listed on the screen except those pick slips in a billing pending status. However, if you select Void All to void all pick slips and any of the other pick slips for that order are in a billing pending status, the system automatically submits the picks to Billing.

The screen displays an error message similar to the following when you select Void All to reprint all pick slips if the Access to Void/Reprint All (A76) secured feature is set to *EXCLUDE:

```
User Not Authorized to Function.
```

When this secured feature is set to *EXCLUDE, the system still allows you to select Void/Unreserve a specific pick slip in order to void it.

See Voiding Pick Slips for information on the `Cannot void pick - OROB unavailable error message`.

Void All Pick Slips and Hold Order

At the Reprint/Void Pick Slips by Order Screen, you can void all lines on the pick slip and hold the order by selecting Void All/Hold Order.

The system changes the status on the pick slip to Void and changes the order status to Hold, using a system hold reason of VD (Pick was Voided).

Error messages:

The screen displays an error message similar to the following if you select Void All/Hold Order if a pick slip is in a billing pending status and other pick slips for that order still exist:

```
Pick 2146 is in Billing Hold status. Void not processed.
```

See Voiding Pick Slips for information on the `Cannot void pick - OROB unavailable error message`.

The system voids all of the pick slips displayed on the screen except those pick slips in a billing pending status. However, if you select Void All/Hold Order to void all pick slips and all of the other pick slips for that order are in a billing pending status, the system automatically submits the picks to Billing.

The screen displays an error message similar to the following when you select Void All/Hold Order to void and hold all lines on the pick slip if the Access to Void/Reprint All (A76) secured feature is set to *EXCLUDE:

```
User Not Authorized to Function.
```

Void All Pick Slips and Cancel Order

At the Reprint/Void Pick Slips by Order Screen, you can void all lines on the pick slip and cancel the order by selecting Void All/Cancel Order.

Void/cancel process: You advance through a series of windows to void and cancel an order:

- Confirm Void window: Click OK to continue with the void/cancel, or click Exit if you do not want to void the pick slip and cancel the order.
- Confirm Unreserve window:
  - If you are canceling the order, your actions at this window do not affect the outcome. You can click OK or Exit to continue; otherwise,
  - To void the pick slip and unreserve the order lines but not cancel the order, select the *Unreserve* field; otherwise, leave the *Unreserve* field unselected to void the pick slip and leave the order line(s) reserved; then, click OK.
- Enter Cancel Reason window: To void the pick slips without canceling the order, do not enter a *Cancel* reason and click Exit; otherwise:
  - Enter a *Cancel* reason to proceed with canceling the order.
  - If there are multiple ship-to's on the order, use the *Cancel all ship to's* field to indicate whether to cancel just the first ship-to; otherwise, this selection does not matter.
  - Select the *Recalculate frt* field to refund freight to the customer; otherwise, leave it unselected.
  - Click OK when you are done.
- If the order includes unbilled membership items: You might proceed through additional windows related to membership cancellations if there are any unbilled membership items on the order. This situation can occur only if your pick slip generation criteria excluded membership items, since otherwise the membership item would have billed at the time you generated the pick slips. See Canceling a Membership Item for more information on the membership item cancellation process and related windows.

> **Note:**
>
> You cannot complete the cancellation of an order through the Void/Cancel option for a retail pickup or delivery order if you do not have authority under the Cancel Order Broker Lines (B19) secured feature. In this situation, the system voids the pick slip but does not cancel the order.

Once you complete the above series of windows, the system changes the status on the pick slip to Void and changes the order status to Canceled.

In addition, if a stored value card payment with an open, unused authorization amount exists on the order, the system generates a stored value card authorization reversal; see Stored Value Card Authorization Reversal.

Error messages:

The system displays an error message similar to the following if you select Void All/Cancel Order and a pick slip is in a billing pending status:

```
Pick Control # 2070 cannot be voided.
```

The system voids all of the pick slips displayed on the screen except those picks slips in a billing pending status. If you select Void All/Cancel Order and all of the other pick slips for that pick generation run are in a billing pending status, the system automatically submits the picks to Billing.

The screen displays the following error message if you select Void All/Cancel Order to void and cancel all lines on the pick slip and the Access to Void/Reprint All (A76) secured feature is set to *EXCLUDE:

`User Not Authorized to Function.`

See Voiding Pick Slips for information on the `Cannot void pick - OROB unavailable` error message.

Work with Pick Control Detail Screen

Purpose: Use this screen to cancel an order detail line, display the Pick Control Detail screen, freeze an item on the order detail line, override locations, display the Work With Order screen, and accept or reject your entries.

How to display this screen: Select Work with for a pick slip at Reprint/Void Pick Slips Screen (Reprinting/Voiding by Pick Control Number), Reprint/Void Pick Slips by Batch Screen, or Reprint/Void Pick Slips by Order Screen.

Error messages: When you select Work with for a pick slip:

The system displays an error message similar to the following when you select Work with for a pick slip that is in a billing pending status:

`Pick cannot by voided/reprinted/changed in this status.`

The system displays an error message similar to the following if a user is currently maintaining this pick slip:

`Pick Control # 9999 is in use by user KLETENDRE.`

Field	Description
Control # (Pick control number)	The control number assigned to a batch of picks. *Numeric, 7 positions; display-only.*
Billing batch # (Billing batch number)	A system-generated batch number that is assigned to each pick slip run. *Numeric, 7 positions; display-only.*
Order #	A unique number assigned by the system to identify an order. Every order on the system is assigned an order number. *Numeric, 8 positions; display-only.*
Ship-to number (Unlabeled field)	A hyphen (-) separates this field from the *Order #* field. Indicates the number of shipping addresses for the order. The system assigns a sequential ship-to number to every order. The first ship-to address is assigned the number one. *Numeric, 3 positions; display-only.*
Ship to name (Ship to name and address)	The name and address of the customer who placed the order. Validated against the Customer Sold-to table. *Alphanumeric, 41 positions (name), 32 positions (address), 10 positions (apartment), 40 positions (city/st/postal/country); display-only.*
Ship via	A code that represents the carrier for this order. Validated against the Ship Via table. *Numeric, 2 positions; display-only.*

Field	Description
Line #	Indicates the line number on the order. Up to 999 detail lines may be entered on an order. Enter a line number to display records starting with the number you entered. *Numeric, 3 positions; optional.*
Item	A code that represents a unit of inventory. *Alphanumeric, 12 positions; display-only.*
SKU	A code that further defines the item. *Alphanumeric, three 4-position fields; display-only.*
Description	The description of the item/SKU. *Alphanumeric, 30 positions; display-only.*
Print (Printed)	The number of units of the item printed and the quantity which should be shipped. *Numeric, 5 positions; display-only.*
Alloc (Allocated)	The number of units of the item allocated and the quantity which should be shipped. This number can be decreased, but never increased. **Note:** If you decrease the allocated quantity and the pick slip is associated with a credit card payment, the system creates a record in the Void Auths table for the amount placed on backorder. *Numeric, 5 positions; display-only.*
Packd (Packed)	The number of units of the item packed and the quantity which is being shipped. Not currently implemented. *Numeric, 5 positions; display-only.*

Screen Option	Procedure
Display an order detail line	Select Display for a detail line to advance to the Pick Control Details Screen (Displaying Pick Control Details).
Freeze an item	Select Freeze Item for a detail line to freeze an item.
Override a location	Select Override Location for a detail line to display the Select a New Pick Location Screen.
Accept the pick control details	Select Accept.
Reject the pick control details	Select Reject.

Pick Control Details Screen (Displaying Pick Control Details)

Purpose: Use this screen to review the pick slip, including the control and line number, the item/SKU and description, the original printed quantity, the actual quantity printed, and the override quantity, if applicable.

How to display this screen: Select Display for a detail line at the Work with Pick Control Detail Screen.

Field	Description
Control # (Pick control number)	The number that you are viewing pick control details for. *Numeric, 7 positions; display-only.*
Line #	Indicates the line number on the order. Up to 999 detail lines can be entered on an order. *Numeric, 3 positions; optional.*
Item/SKU	The unit of inventory that you are viewing pick control details for. *Alphanumeric, 12 positions (item), three 4-position fields (SKU); display-only.*
Description	The description of the item/SKU that you are viewing pick control details for. *Alphanumeric, 30 positions; display-only.*
Original qty printed	The original quantity that was printed on the pick. This becomes important if the quantity on the pick is changed. *Numeric, 5 positions; display-only.*
Qty printed	The number of units of the item printed and the quantity which should be shipped. *Numeric, 5 positions; display-only.*
Override qty	The number of units that supersede the original quantity. *Numeric, 5 positions; display-only.*

Freezing an Item

Purpose: You freeze an item or SKU in a location to prevent picks slips from printing. For example, you might choose to freeze an item/SKU that has been damaged while in the warehouse so that it will not ship to a customer.

If you select the Reservation freeze flag in the Item Location table, the system does not generate pick slips. However, all other inventory transaction are allowed.

How to freeze an item: Select Freeze Item for an item on the Work with Pick Control Detail Screen.

Results: A batch program runs in the background and flags the item as frozen in the Item Location table.

Select a New Pick Location Screen

Purpose: Use this screen to override the location for picking an order detail line.

How to display this screen: Select Override Location for an item at the Display Pick Control Header (1 of 2) Screen.

Field	Description
Control # (Pick control number)	The number that you are viewing pick control details for. *Numeric, 7 positions; display-only.*
Line #	Indicates the line number that you are viewing pick control details for. Up to 999 detail lines may be entered on an order. *Numeric, 3 positions; optional.*
W/H (Warehouse)	The warehouse code. Validated against the Warehouse table. *Numeric, 3 positions; display-only.*
Location	A code that represents an area within the warehouse that contains the item/SKU. Typically the location code is composed of a single alphanumeric character for Zone, and two numbers each for Aisle, Shelf, and Bin. For instance, the location A010201 indicates: `Zone Aisle Shelf Bin` `A 01 02 01` *Alphanumeric, 7 positions; display-only.*
Quantity	The quantity allocated to this pick slip from the warehouse location. You can enter a quantity at this field . *Numeric, 3 positions; display-only.*

Screen Option	Procedure
Select a location	Select Select Loc to advance to the Select Item Location Screen.

Select Item Location Screen

Purpose: Use this screen to select a new location for this pick control detail.

How to display this screen: Select Select Loc at the Select a New Pick Location Screen.

Field	Description
Item	A code that represents a unit of inventory. *Alphanumeric, 12 positions; display-only.*
SKU	A code that further defines the item. *Alphanumeric, three 4-position fields; display-only.*
Whs (Warehouse)	The code for this warehouse. Validated against the Warehouse table. *Numeric, 3 positions; display-only.*

Field	Description
Location	A code that represents an area within the warehouse that contains the item/SKU. Typically the location code is composed of a single alphanumeric character for Zone, and two numbers each for Aisle, Shelf, and Bin. For instance, the location A010201 indicates: Zone: A Aisle: 01 Shelf: 02 Bin: 01 You can enter a different location at this field. *Alphanumeric, 7 positions; optional.*
Location	Displays the location code that you want to pick from. *Alphanumeric, 7 positions; display-only.*
Pickable	• Selected = Indicates that inventory can be picked from the location. • Unselected = Indicates that inventory cannot be picked from the location.
Zone	Identifies the warehouse zone where the location is situated. *Alphanumeric, 1 position; display-only.*
Aisle	Identifies the warehouse aisle of the location. *Alphanumeric, 2 positions; display-only.*
Shelf	Identifies the location's shelf number within the aisle. *Alphanumeric, 2 positions; display-only.*
Bin #	Identifies the location's bin number on the shelf. *Alphanumeric, 2 positions; display-only.*
Freeze (Freeze flag)	Indicates whether the item location or SKU location is frozen. Valid values are: • Selected = The item/SKU location is frozen. • Unselected = The item/SKU location is not frozen. If a location is frozen, Pick Slip Generation does not print picks. See Performing Pick Slip Generation. **Note:** Even though a pick slip does not print for an item from a frozen item location, the system still reserves the item on the Order Lines Fields in Order Entry.
Available	The number of items that are available at this location. *Alphanumeric, 1 position; display-only.*

Screen Option	Procedure
Select the item location	Select Select Request for a location to return to the Select a New Pick Location Screen. The system automatically enters any information that you entered at the Select Item Location Screen.

Void Pick Batch (WSVP)

Purpose: Use this option to void a batch of picks without unreserving, canceling, reprinting, or holding the related orders or order lines. You might use this option when you have printed a batch of pick slips incorrectly and need to reprint them.

Void Pick Batch Screen

How to display this screen: Enter WSVP in the *Fast path* field at the top of any menu, or select Void Pick Batch from a menu.

Completing this screen: Enter the 7-position billing batch number in the *Billing batch #* field and select Void Batch.

> **Note:**
>
> You cannot use this screen to void pick slips if pick slip generation is currently active. Instead, the screen displays an error: `Pick Slip Generation is active`.

Updates: See Voiding Pick Slips for information on the updates performed when you void a batch of pick slips.

Printing the Fill Rate Reports (PFRR)

Purpose: Use the fill rate, shipment summary, and backorder summary reports to quickly evaluate your stock status for fulfilling orders. These reports help you identify how much you have to handle each order before the order is completely shipped.

What these reports can help you determine is if you are able to ship an order completely immediately or if there are typically lines backordered on the majority of your orders. If so, you have to make more than one shipment on the order -- which costs you money and customer satisfaction.

The information on these reports might indicate that you have a problem with your purchasing department or your vendors, because you don't have enough stock on-hand to fulfill your orders.

In this topic:

- Submit Fill Rate Reports Screen
- Fill Rate Report
- Shipment Summary Report
- Backorder Summary Report

Submit Fill Rate Reports Screen

How to display this screen: Enter PFRR in the *Fast path* field at the top of any menu screen or select the Print Fill Rate Reports option from the menu.

You can attach this option to the CONFIRM menu (which you use to confirm and bill orders for shipment) or to a periodic process, such as on the NIGHTLY menu, so you can keep on top of your order fulfillment status.

At this screen, you may specify the offer you want to run the report for, the date range for the report, and which report(s) you want to print.

Field	Description
Offer	Enter the code for the catalog, space or television advertisement you want to report on. The report will reflect the backorder/fulfillment status for this offer only. Offer codes are defined in and validated against the Offer table; see Working with Offers (WOFR). You must specify an offer or a date range for this report. *Alphanumeric, 3 positions; optional.*
Date range	The dates through which you want to report on your backorder/fulfillment status. This date range is associated with the effective dates for the offer, as defined in the *Offer date range* fields in the Offer table. Only offers effective during this date range will be included on these reports. You must specify an offer or a date range for this report. *Numeric, 6 positions (in user date format); optional.*
Reports to print	Use this area of the screen to select which reports you want to print. Choices are: • Fill Rate Report, which gives you a view of your in stock rate for fulfilling orders. • Shipment Summary Report, which shows the number and percentage of single and multiple shipments. • Backorder Summary Report, which ages single and multiple shipments on your orders, using predefined aging buckets. Valid values are: • Selected = (Default): Run the report. • Unselected = Do not run the report.

Setting Up the Fulfillment Tables

Topics in this part:

- Working with Ship Via Codes (WVIA) describes creating, changing, deleting, and displaying shipper records. Additionally, you will find displaying ship via history; working with, creating, changing, and deleting shipper items; and working with SCF ship via values.
- Working with SCF Codes (WSCF) describes creating Sectional Center Facility (SCF) codes.
- Working with SCF/Ship Via Values (WSHV) explains how to create, change, delete, and display these codes.

- Working with Shipping Rates (WSHR) includes creating, changing, deleting, and displaying shipping rates.
- Working with Drop Points (WDPT) describes creating, changing, deleting, and displaying these codes.
- Editing Warehouse Drop Points (EWDP) describes creating, changing, and deleting warehouse drop point information.
- Editing SCF Ship Via (ESSV) describes how to create, change, or delete multiple SCF/ship via values quickly.
- Working with Dunnage Weight (WDUN) describes creating dunnage weights based on the cube of the items on a pick slip, and changing and deleting dunnage weights.
- Working with Zip/Ship Via (WZSV) describes how to cross-reference default shippers for specific destinations based on zip code; this allows you to assign carriers automatically.
- Working with Tax Jurisdiction (WTXJ) describes how to create and work with special tax jurisdiction areas, defined by zip code.
- Working with Weight Tables for Order Weight (WFTB) describes how to create and work with freight tables for the Freight by Order Weight freight method defined for a source code.
- Working with Offer Ship Via Assignment (WSVA) describes how to create and work with ship via overrides based on offer or source code, order or merchandise dollar total, and geographical area.
- Working with Lines of Business (WLOB) describes how to create and work with line of business codes and assignments and explains how the system assigns a line of business to an order.
- Displaying the Line of Business Order Queue Summary (DLOQ) describes the statistics on the Display Line of Business Order Queue Summary screen and explains how the system updates the information on this screen.
- Creating SCF Ship Vias by SCF Range (MSSV) describes how to create SCF ship via information for a selected SCF range, rather then entering this information for each SCF or drop point.
- Load USPS Zip Code File (LZPS) describes how to upload current postal code information from a CD provided by the U.S. Postal Service.

Working with Ship Via Codes (WVIA)

Purpose: Ship via codes represent the carrier or service that delivers merchandise from you to your customers.

Each order must be assigned a valid shipper code in Order Entry.

In this topic:

- Ship Via Defaults
- Ship Via Override Hierarchy
- Work with Ship Via Screen
- Create Ship Via (1 of 2) Screen
- Create Ship Via (2 of 2) Screen
- Display Ship Via History Screen

- Work with Ship Via/Item Screen
  - Create Ship Via/Item Screen
- Working with Best Way Ship Vias
  - Best Way Ship Via Pop-up Window
- Work with Ship Via Indicia Screen
  - Create Ship Via Indicia Screen (Entering the Carrier's Indicia Information)
- Work with Dollar Chart by Ship Via Screen (Ship Via Service Charges)
  - Create Dollar Chart by Ship Via Screen (Service Charge Dollar Chart)
- Work with Weight Charges by Ship Via Screen
  - Create Weight Charges by Ship Via Screen (Order Weight Charges)

Ship Via Defaults

The ship via code defaults in Order Entry, based on:

- a default ship via defined in the Default Ship Via (A77) system control value or at the Default Values for Orders screen.
- a preferred ship via, based on the SCF (first three positions of the destination postal code) to which the order is shipping.
- a ship via code defined for an item.

Order Orchestration orders: If you receive retail pickup or delivery orders from Order Orchestration, you also need to define the Order Broker Ship Via (K94) to use if the fulfillment response message from Order Orchestration does not specify a ship via. See Order Orchestration Integration for a discussion.

Ship Via Override Hierarchy

There are several ways the system can override the shipper specified on the order with another shipper. This table displays the ship via overrides that can apply to an order in the hierarchy in which the overrides apply. For example, the Promotion override is listed first, indicating that it overrides any other ship via substitution on an order.

Ship Via Overrides

Table	Results
Ship via overrides at the order header level	
Promotion	If an order, or shipping address on an order, qualifies for a promotion with a ship via override, the system changes the ship via on the order header when you select Accept or select Add Recipient to accept the order. This is the last ship via substitution that the system makes during order entry, and it overrides any previous ship via substitutions. See Working with Promotions (WPRO) for more information on defining a ship via override for a promotion.

Table	Results
Zip/Ship Via	If the ship via on the order header allows auto-assignment of carrier (the ship via's *Allow auto assignment* field is selected) and a default ship via is defined for the postal code on the order, the system changes the ship via for the ship to customer to the default ship via for the postal code. See Working with Zip/Ship Via (WZSV).
Offer Ship Via	If an order, or shipping address on an order, qualifies for an offer ship via override, the system changes the ship via on the order header when you select Accept or Add Recipient to accept the order. See Working with Offer Ship Via Assignment (WSVA).
Preferred Ship Via for SCF	If you define a *Preferred ship via* or the SCF and the *Allow auto assignment* field for this ship via is selected, the system changes the *Ship via* on the order header to the preferred ship via. See Working with SCF Codes (WSCF).
Best Way Ship Via	If you select a best way ship via from the Alternate Shipping Charges by Via Window in order entry, or the system assigns a best way ship via automatically, it changes the ship via on the order header to the best way ship via. See Working with Best Way Ship Vias.
Default Ship Via	If a ship via is defined in the Default Ship Via (A77) system control value, the system assigns this ship via to the order by default.
Ship via overrides at the order line level	These ship via overrides do not apply to the order header.
Item Ship Via Override	Item ship via overrides define the shippers that are eligible to ship an item to its destination. If you define item ship via overrides for an item, the system verifies that the ship via on the order header is an eligible shipper for each item on the order whose *Ship via* field is blank. If the shipper on the order header is not valid for an item on an order line, the system displays the Ship Via Overrides for Item Window, requiring you to select an eligible shipper for the item. The ship via you select is assigned to the item on the order line, however, the system does not override the ship via on the order header. See Working with Item Ship Via Overrides.
Item	If you define a ship via code in the *Ship via* field for an item, the system defaults this ship via code to the order line.

Work with Ship Via Screen

Purpose: Use this screen to create, change, delete, or display ship vias. This screen also provides access to the Ship Via History table where the system captures life-to-date and current information for packages delivered and freight collected, summarized by year and period.

How to display this screen: Enter WVIA in the *Fast path* field at the top of any menu or select Work with Ship Via from a menu.

Field	Description
Code	A code that represents the shipper. *Numeric, 2 positions; optional.*
Description	The description associated with the ship via code. *Alphanumeric, 30 positions; optional.*

Screen Option	Procedure
Create a ship via code	Select Create. See Create Ship Via (1 of 2) Screen and Create Ship Via (2 of 2) Screen.
Change a ship via code	Select Change for a shipper to advance to the Change Ship Via screen. At this screen you can change any information except the shipper code. See Create Ship Via (1 of 2) Screen for field descriptions.
Delete a ship via code	Select Delete for a shipper to delete it. If a record of this ship via exists anywhere on the system, an error message indicates that you have a record of the ship via in another table; for example, in the SCF/Ship Via table. **Note:** You cannot delete a ship via code if it is used on an order.
Display a ship via code	Select Display for a shipper to advance to the Display Ship Via screen. You cannot change any information on this screen. See Create Ship Via (1 of 2) Screen and Create Ship Via (2 of 2) Screen for field descriptions.
Display ship via history	Select History for a shipper to advance to the Display Ship Via History Screen.
Work with shipper item charges	Select Item Charges for a shipper to advance to the Work with Ship Via/Item Screen.
Define alternate shippers for a ship via	Select Best Way for a shipper to advance to the Best Way Ship Via Pop-up Window. See Working with Best Way Ship Vias for a discussion.
Identify the distribution center (warehouse or drop point) in order to calculate shipping charges	Select Indicia for a shipper to advance to the Work with Ship Via Indicia Screen.
Define service charges for a ship via	Select Service Charges for a shipper to advance to the Work with Dollar Chart by Ship Via Screen (Ship Via Service Charges).
Define weight charges for a ship via	Select Weight Charges for a shipper to advance to the Work with Weight Charges by Ship Via Screen.
Work with user fields for a ship via	Select User Field for a shipper. See Work with User Fields Screen.

Screen Option	Procedure
Work with SCF Ship Via codes	Select W/W SCF Ship Via. See Working with SCF/Ship Via Values (WSHV).

Create Ship Via (1 of 2) Screen

Purpose: Use the Create Ship Via screens to create a ship via code.

Select OK at this screen to advance to the Create Ship Via (2 of 2) Screen, where you can enter additional ship via code information.

How to display this screen: At the Work with Ship Via Screen, select Create to display the first Create Ship Via screen.

Field	Description
Ship via	A code for the shipper that delivers merchandise to the customer, such as 01 for UPS. You can use any value from 01 to 98. *Numeric, 2 positions.* *Create screen: required.* *Change screen: display-only.*
Ship via description	The description associated with the ship via code, such as United Parcel Service, Parcel Post, Federal Express, etc. *Alphanumeric, 30 positions; required.*

Field	Description
Type	A code that identifies the type of shipper for this ship via code. This information is used during pick slip generation to sort all similar shippers together. Additionally, the system validates that, for example, you specify whether an address is a business or a residence, which is required for UPS (U) shippers. Depending on the pick slip printing program you use, you can customize the format and information that prints for certain types of ship vias. Valid values are: • **DHL** • **Federal Express** • **Parcel Post** • **Parcel Post Class 1** • **Parcel Post Class 2** • **Parcel Post Class 3** • **Parcel Post Class 4** • **UPS** **Note:** Tracking shipment history through live links at the Display Package Information Screen is supported only for Federal Express, UPS, and Parcel Post (not Parcel Post Class 1, 2, 3, or 4) ship via types. *Optional.*
Freight percent	Used in the Percentage/Ship Via freight method. With this freight method, the merchandise amount on the order is multiplied by the percentage in the *Freight percent* field in the Ship Via record to calculate shipping charges. The calculated freight charge cannot be less than/greater than the value in the Freight (min/max) field. The system uses the freight fee in the *Frt min* field of the Ship Via record if the result of the freight calculation is less than the minimum freight fee. Otherwise, the system uses the freight fee in the *Frt max* field of the Ship Via record if the result of the freight calculation is greater than the maximum freight fee. *Numeric, 5 positions with a 2-place decimal; optional.*
Priority (Ship via priority)	Controls how the system allocates inventory to backorders or reserves inventory during Batch Reservation. Valid values range from 0 to 9, where: • 0 = Lowest priority • 9 = Highest priority The Immediate Reservation program that reserves inventory during Order Entry does not use the priority defined at the ship via level or the source code level. *Numeric, 1 position; required.*

Field	Description
Carrier	A short description of the ship via. This code prints on pick slips and reports. Example: UPSB (for “UPS Blue”) *Alphanumeric, 4 positions; optional.*
Billing	This code indicates how orders being delivered by this shipper are processed and billed. This code only applies to the ship via on the name and address screen of Order Entry (known as the “Order Header” screen). Valid values are: • Regular = Indicates that orders for this shipper are processed through “regular” processing which produces pick slips after reservation and must be confirmed (manifested) or billed manually. • Express = orders for this shipper bypass reservation, confirmation, and pick slip generation and are billed immediately after the order is accepted. For example, an express ship via code may be used to record the sale of a mis-shipped item. When an express bill ship via is used in Order Entry, a pop-up window appears where you may indicate whether inventory should be reduced and identify the warehouse and location from which the item was taken. *Optional.*
Freight (min/max)	These two fields identify the minimum and maximum freight charge for this ship via when using the Percentage/Ship Via freight method. This method multiplies the merchandise amount of the order by the percentage in the Freight percent field in the ship via record. The system uses the value in the *Freight min* field as the freight charge if the calculated freight charge is less than this value. The system uses the value in the *Freight max* field as the freight charge if the calculated freight charge is greater than this value. *Numeric, 13 positions with a 2-place decimal; optional.*
Use delivery codes	Indicates whether this shipper charges freight based on rate tables. For example, UPS charges different rates when shipping to someone's home or office. Valid values are: • Selected = the system uses a rate table to calculate shipping charges for this shipper • Unselected = the system does not use a rate table to calculate shipping charges for this shipper
PO box delivery	Indicates whether this shipper delivers to post office (P.O.) boxes. Any address that includes P.O. Box or APO/FPO must be delivered to a post office box. Valid values are: • Selected = the shipper delivers to post office boxes. You can enter P.O. Box or APO/FPO information in the Street field during Order Entry. • Unselected = the shipper does not deliver to post office boxes. The system displays a message during Order Entry that the shipper cannot deliver to a P.O. box.

Field	Description
Add'l freight only	Indicates whether the freight fee defined in the *Add'l freight charge* field is used as the shipping charge for orders delivered by this shipper. Valid values are: • Selected = The system applies the *Add'l freight charge* field as the shipping charge to the order if the merchandise amount is less than or equal to the amount in the *$ limit* field. The system does not calculate freight for the order based on the freight method defined for the source code on the order header. • Unselected = The system calculates freight for the order based on the freight method defined for the source code on the order header. In addition, the system applies the *Add'l freight charge* to the order if the merchandise amount is less than or equal to the amount in the *$ limit* field.
Add'l freight charge	An additional charge for packages delivered by this shipper. For example, you may add additional freight charges for express delivery services such as UPS Next Day or Federal Express. • If the *Add'l freight only* field is selected, the system uses the additional freight charge as the shipping charge on the order; no other freight charges are applied to the order. • If the *Add'l freight only* field is unselected, the system adds the additional freight charge to the order in addition to the freight calculated for the order based on the freight method defined for the source code on the order header. If the merchandise amount on the order is greater than the amount in the *$ limit* field, the system does not add the *Add'l freight charge* to the order, regardless of the setting of the *Add'l freight only* field. • During Order Entry, the Freight+ field is calculated and updated with the *Add'l freight charges* value only if the ship via for which you have defined additional charges is on the order header. • The additional freight charges are included in the *Charges* field at the Alternate Shipping Charges by Via Window for the purposes of allowing the customer to select a best way shipper in order entry. *Numeric, 13 positions with a 2-place decimal; optional.*
$ limit	The merchandise dollar amount required to add the additional freight charge to the order. • If the merchandise dollar amount is equal to or below this value, the system adds the additional freight charge to the order. • If the merchandise dollar amount is greater than this value, the system does not add the additional freight charge to the order. *Alphanumeric, 1 position; required if you define an add'l freight charge.*

Field	Description
Allow auto assignment	Indicates whether the system can change the shipper on an order if there is a Ship via defined for the destination postal code in the Zip/Ship Via table, or if there is a Preferred ship via defined for the SCF code. Valid values are: • Selected = the system checks the Zip/Ship Via table and the SCF table when you accept a new order (using Accept or Accept/Add Rcp.) and changes the shipper code if a default shipper is found for the postal code to which the order is shipping. **Note:** This process occurs only if you are using the Order Recap screen, as specified by the Display Order Recap (A75) system control value. • Unselected = (default) the shipper code will not be changed.
Maximum carton weight	Defines the carton weight for the system to use when calculating freight using the *Freight by order weight* freight method. See Working with Weight Tables for Order Weight (WFTB) for more information on setting up freight tables and using this method. **Note:** The system does not use this value in any other calculation or validation. *Numeric, 13 positions with a 3-place decimal; optional.*
Exempt duty charges	Indicates whether the system should add duty charges to orders this shipper delivers, or whether the shipper is exempt. Valid values are: • selected = Do not add duty charges to orders this shipper delivers. • unselected = Add duty charges to orders for this shipper where applicable. The system determines whether to add duty charges to an order by comparing an item's harmonize code with the harmonize codes defined for a country's duty rates. See Setting Up the Country Table (WCTY).

Field	Description
Telephone #	The phone number for this ship via. You can define a telephone number format to map to the phone numbers operators enter into the system. The system defaults the telephone number formats for the country defined in the Default Country for Customer Address (B17) system control value for any phone number entered on this screen. See Setting Up the Country Table (WCTY). *Alphanumeric, 14 positions; optional.*
Download to e-commerce	Indicates whether to make the shipper available to customers on the web storefront. Valid values are: • Selected = Download ship via code to the web storefront. • Unselected = Do not download ship via code to the web storefront. When you deselect this field, the SCF/Ship Via download program does not download the SCF/Ship Via record since the ship via is not valid for the web storefront. See Working with SCF/Ship Via Values (WSHV).

Create Ship Via (2 of 2) Screen

How to display this screen: Select OK at the Create Ship Via (1 of 2) Screen to display the second Create Ship Via screen.

Field	Description
Alternate ship via 1	A code for the shipper to use in place of the primary shipper, if the values in the # of days since 1st shipment field or the# of shipments are met. Example: If the primary shipper is an overnight carrier and the order includes backordered items, you may want to ship the backordered items by an alternate shipper to save on shipping charges. The system uses this ship via code for all items on the order during pick slip generation and displays a message in Order Information. The ship via code entered here is defined in and validated against the Ship Via table. *Numeric, 2 positions; optional.*
# of days since 1st shipment	The number of days since the first shipment after which the Alternate ship via 1 will be used. *Numeric, 3 positions; optional.*
# of shipments	The number of shipments after which the Alternate ship via 1 will be used. Example: If the primary shipper is an overnight shipper and there have been 2 shipments on the order, you may switch to an alternate shipper to save shipping charges. *Numeric, 2 positions; optional.*

Field	Description
Alternate ship via 2	The shipper to use in place of the primary shipper if the weight or dollar value of the carton is less than the value in the Minimum weight or Minimum value fields. *Numeric, 2 positions; optional.*
Minimum weight	The minimum weight of a package to be delivered by the primary shipper; if the package weighs less than this minimum, alternate shipper 2 is used instead. **Note:** The system uses the item's Ship wgt. (Shipping weight) to evaluate minimum weight. *Numeric, 13 positions with a 3-place decimal; optional.*
Minimum value	The minimum dollar value of a carton being delivered by the shipper defined in the Alternate ship via 2 field. If the value of items in the carton is low, you may want to send the shipment by a uninsured carrier. *Numeric, 13 positions with a 2-place decimal; optional.*
Alternate ship via 3	This code represents a shipper to use in place of the primary shipper, if the weight or dollar value of the carton is greater than the value in the Maximum weight or Maximum value fields. *Numeric, 2 positions; optional.*
Maximum weight	The maximum weight of a carton being delivered by the shipper defined in the Alternate ship via 3 field. *Numeric, 13 positions with a 3-place decimal; optional.*
Maximum value	The maximum dollar value of a carton being delivered by the shipper defined in the Alternate ship via 3 field. If the value of the carton is high, you may want to send the shipment by an insured carrier. *Numeric, 13 positions with a 2-place decimal; optional.*

Field	Description
Decision Manager Service Level	Informational field to identify the service level assigned to the ship via. If you are using CyberSource Decision Manager Fraud Scoring, Order Administration maps the *Service Level* for the ship via to the shipTo *ShippingMethod* in the CyberSource Authorization Request (ccAuthService) XML Message. Service levels defined in CyberSource Decision Manager are: • sameday: Courier or same day service. • oneday: Next day or overnight service. • twoday: Two day service. • threeday: Three day service. • lowcost: Lowest cost service • pickup: Store pickup • other: Other shipping method. • none: No shipping method because product is a service or subscription. When a *ShippingMethod* is defined for a ship to in the ccAuthService message, the shipping address is not automatically added to the Decision Manager negative list. You can add a shipping address to the negative list using the Transaction Marking Tool; see *Marking Order Data During Order Review* in the Case Management section of the Decision Manager User Guide. **Note:** To use a custom value, create a Decision Manager custom rule with the shipping method order element. *Alphanumeric, 20 positions; optional.*
ChannelAdvisor carrier	Together with the *Channel Advisor Service Class*, serves as a cross reference to the carrier passed through ChannelAdvisor. See ChannelAdvisor Integration Overview and ChannelAdvisor Setup for background. *Alphanumeric, 60 positions; optional.*
ChannelAdvisor Service Class	Together with the *ChannelAdvisor Carrier*, serves as a cross reference to the carrier passed through ChannelAdvisor. See ChannelAdvisor Integration Overview and ChannelAdvisor Setup for background. *Alphanumeric, 60 positions; optional.*
Narvar Carrier Name	The name identifying the carrier to Narvar. Passed to Narvar as the `carrier`. If not populated with a valid carrier line, `OTHER` is passed to Narvar, as the carrier and tracking number links do not work correctly. The list of valid carrier names and service codes are provided by Narvar. See Narvar Integration for background. Case-insensitive. *Alphanumeric, 60 positions; optional.*

Field	Description
Narvar Carrier Service Code	The service code identifying the carrier's level of service to Narvar. Passed to Narvar as the `carrier_service`. Optional for the Narvar shipment notification. The list of valid carrier names and service codes are provided by Narvar. See Narvar Integration for background. Case-insensitive. *Alphanumeric, 60 positions; optional.*

Display Ship Via History Screen

Purpose: Use this screen to review historical and current information for this shipper. Billing updates this information and sequences it by period, within the year.

How to display this screen:

- At the Work with Ship Via Screen, select History for a ship via code.
- At the Change Ship Via screen or Display Ship Via screen, select Ship Via History.

Field	Description
Ship via	The code and description for the shipper. *Numeric, 2 positions; display-only.*
Packages (to date)	The number of packages delivered by this shipper life-to-date. The Billing program updates this field. *Numeric, 7 positions; display-only.*
Freight collected (Freight collected to date)	The estimated dollar amount charged to date by the shipper to deliver the packages, not including additional freight charges. The Billing program increases this value for sales and decreases this value for returns whose *Refund freight* is selected. *Numeric, 11 positions with 2-place decimal; display-only.*
Packages (today)	The number of packages delivered by this shipper today. The Billing program updates this value with the number of picks produced and the associated shipping charges. This number is not updated if the transaction is a return or exchange. *Numeric, 7 positions; display-only.*
Freight collected (Freight collected today)	The estimated dollar amount charged today by the shipper to deliver the package, not including additional freight charges. The Billing program increases this value for sales and decreases this value for returns whose *Refund freight* is selected. *Numeric, 11 positions with 2-place decimal; display-only.*
Year	The last two digits of the year associated with the accounting period. Enter a year to display history for that year. *Numeric, 2 positions; optional.*
Period	The accounting period within the specified year. Typically, accounting periods equate to months. *Numeric, 2 positions; optional.*
Packages	The number of packages delivered by this ship via during the specified year and/or period. *Numeric, 7 positions; display-only.*

Field	Description
Freight collected (Freight collected for year, period)	The estimated dollar amount charged for the year and period by the shipper for deliveries, not including additional freight charges. The Billing program increases this value for sales and decreases this value for returns whose *Refund freight* is selected. *Numeric, 11 positions with 2-place decimal; display-only.*

Work with Ship Via/Item Screen

Purpose: Use this screen to define an extra freight charge for shipping a particular item by this shipper. For example, you may want to charge an extra $20.00 for shipping a piece of furniture. The additional shipper/item freight charge is included in the *Freight +* field in Order Entry, and listed as the *Add'l frt* charge for the order detail line in order inquiry.

> **Note:**
>
> The shipper/item charges are included in the *Charges* field at the Alternate Shipping Charges by Via Window for the purposes of allowing the customer to select a best way shipper in order entry.

How to display this screen: From the Work with Ship Via Screen, select Item Charges for a ship via code.

Field	Description
Item	The code for an item you sell. *Alphanumeric, 12 positions; optional.*
Extra charge	The extra charge that is added to orders for this item. *Numeric, 13 positions with a 2-place decimal; display-only.*

Screen Option	Procedure
Create a new shipper/ item	Select Create to advance to the Create Ship Via/Item Screen.
Change shipper/items	Select Change for an item to advance to the Change Ship Via/ Item screen. At this screen you can change any information except the item number. See Create Ship Via/Item Screen for field descriptions.
Delete shipper/items	Select Delete for an item to delete it.

Create Ship Via/Item Screen

Purpose: Use this screen to create a shipper/item charge.

How to display this screen: At the Work with Ship Via/Item Screen, select Create.

Field	Description
Ship via	The shipper that delivers the order to the customer. Ship via codes are defined in and validated against the Ship Via table. **Note:** If this ship via is entered in the Ship via field for the item record, the ship via will default on the order line in order entry, and the shipper/item charge will be added to the order, regardless of whether this is the ship via defined on the order header. See Performing Initial Item Entry (MITM). *Numeric, 2 positions; display only.*
Item	The code for an item you sell. Item codes are defined in and validated against the Item table. *Alphanumeric, 12 positions.* *Create screen: required.* *Change screen: display-only.*
Extra charge	The extra charge that is added to orders for shipping this item. *Numeric, 13 positions with a 2-place decimal; required.*

Working with Best Way Ship Vias

Purpose: Use the Best Way Ship Via table to define alternate shippers for a particular ship via to use the best way shipping feature.

Best way shipping in order entry can either display a window enabling the order entry operator to offer a choice of shipment options to the customer, or have the system automatically select the ship via with the lowest overall shipping charges.

If you display the Alternate Shipping Charges by Via Window, the customer can select a less expensive shipper, or choose a shipper who can deliver the order sooner. The window lists each of the alternate shippers identified with a *Type* of O in the Best Way Ship Via table. The operator can select a different shipper for the order, or accept the current ship via. To have the system automatically apply the best way shipper with the lowest charges, you use the Best Way Ship Via for Auto-Assignment (J67) system control value. In this situation, the Alternate Shipping Charges by Via Window does not open automatically in order entry, and the ship via assignment takes place “behind the scenes.”

What factors affect the freight charges? While the freight method specified for the source code on the order header controls the basic freight charges on an order, there are other factors that can make one ship via more or less expensive than another, including:

- Add'l freight charge
- shipper/item charges (see Work with Ship Via/Item Screen)
- service charges (see Work with Dollar Chart by Ship Via Screen (Ship Via Service Charges))
- weight charges (see Work with Weight Charges by Ship Via Screen)

- handling charges (if the Include Special Handling in Alternate Shipping Charges by Via (I03) system control value is selected)

Additionally, based on the information displayed at the Alternate Shipping Charges by Via Window, a customer can select a shipper that is not the least expensive, but offers a quicker delivery date.

Preventing the customer's selection from being overridden: If you are using best way shipping in order entry, you should set up the shipper so that no subsequent ship via overrides will take place. Additional ship via overrides include:

- freight promotions (see Working with Promotions (WPRO))
- item ship via overrides (see Working with Item Ship Via Overrides)
- default ship via defined for item

Also, you can leave the Allow auto assignment field to unselected to prevent the following ship via overrides from taking place:

- zip/ship via default (see Working with Zip/Ship Via (WZSV))
- a *Preferred ship via* for the SCF (see Working with SCF Codes (WSCF))

See Ship Via Override Hierarchy for a list of ways the system can override the shipper specified on the order with another shipper and the hierarchy in which the ship via overrides take precedence.

Related system control values: Use the following system control values to control the function of the best way shipping window in order entry:

- Best Way Ship Via for Auto-Assignment (J67)
- Display Alternate Shipping Charges by Via Window in OM (I02)
- Include Special Handling in Alternate Shipping Charges by Via (I03)
- Use Business Days When Calculating Expected Delivery Date (K38)
- Warehouse Cutoff Time (K39)

Summary of best way shipping types: The ways in which best way shipping at order entry vary are summarized in the following table:

	In Order Entry (with Pop-up Window)	In Order Entry (Automatic)
Purpose:	The Alternate Shipping Charges by Via Window in order entry lets you offer the customer the option to select a ship via based on freight charges or expected delivery date.	The system automatically selects the best way ship via with the lowest overall shipping charges
Shippers identified by:	*Type* = O	

	In Order Entry (with Pop-up Window)	In Order Entry (Automatic)
Additional required setup:	Leave the Best Way Ship Via for Auto-Assignment (J67) system control value unselected Optionally: • use the Display Alternate Shipping Charges by Via Window in OM (I02), Include Special Handling in Alternate Shipping Charges by Via (I03), Use Business Days When Calculating Expected Delivery Date (K38), and Warehouse Cutoff Time (K39) system control values • leave the Allow auto assignment field to unselected	Select the Best Way Ship Via for Auto-Assignment (J67) system control value; see that system control value for additional setup requirements

Best Way Ship Via Pop-up Window

How to display this window: Select Best Way for a ship via code at the Work with Ship Via Screen.

Field	Description
Best way ship via	The code for the alternate shipper you want to evaluate for best way shipping. **Note:** In order to add a best way ship via to an order, it needs to have a valid SCF/ ship via records for the shipping address. *Numeric, 2 positions; required.*
Type	The type of best way shipping. Valid values are: • O = order entry: You can select the best way shipper at the Alternate Shipping Charges by Via Window in order entry to provide the customer a choice of shippers for the order, or have the system automatically select the best way shipper with the lowest overall charges if the Best Way Ship Via for Auto-Assignment (J67) system control value is selected. See above for more information. • P = pick slip: *This value is not currently implemented.* *Alphanumeric, 1 position; required.*

Adding a best way ship via: Complete the *Via* and *Type* field and click OK to add a new alternate shipper for the primary ship via. Your entry “drops down” to the list of best way shippers.

To delete: Select Delete for a shipper to remove it as a best way shipper.

To display: Select Display Ship Via for a shipper to advance to the Display Ship Via History Screen.

Work with Ship Via Indicia Screen

Indicia messages are messages you enter to print on the pick slip, such as shipping instructions or notes to the carrier. The indicia message that displays is determined by the drop point associated with the ship via for an order. The drop point associated with the ship via for an order depends on whether or not you are using the *Zone skipping* feature in Pick Slip Generation.

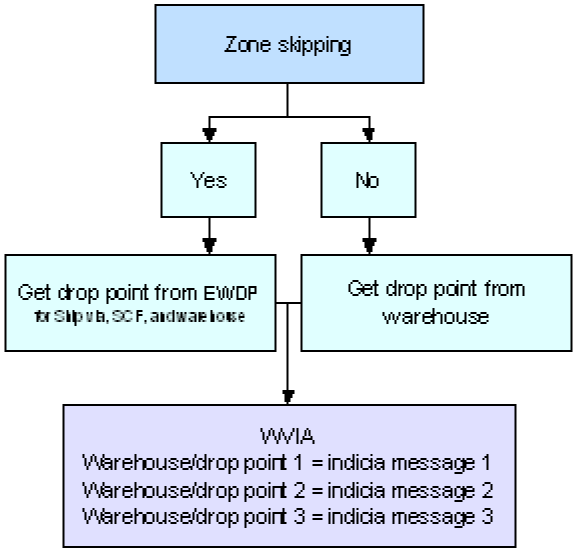
Drop points represent locations to which merchandise will be shipped from your warehouse. Typically, a drop point represents the address of a UPS facility. This drop point prints as the return address on the pick slip and is the destination to which undeliverable packages are returned.

You must specify drop points for shipping in two ways: you set up a drop point for each warehouse when you enter warehouse information using Work with Warehouses (see Creating and Maintaining Warehouses (WWHS)); the system uses this drop point in Pick Slip generation if you are not using the *Zone skipping* feature, or you can optionally specify drop points for each warehouse, ship via, and SCF combination using the Editing Warehouse Drop Points (EWDP) menu option; the system uses the drop points you specify in this menu option when you select the *Zone skipping* feature in Pick Slip Generation.

Setting up indicia messages: Each drop point/ship via combination for a pick slip identifies a unique indicia message. You set up indicia messages for each ship via/ drop point combination using the Work with Ship Via menu option. Each ship via can have multiple indicia messages, one message for each drop point.

Zone skipping is a method of reducing freight charges by shipping inventory via one carrier to a central drop point, where it is picked up by another carrier and delivered to its final destination. For example, if you are shipping from a Massachusetts warehouse to destinations in California, you might use one carrier to deliver all packages to a UPS center in California, from which they will be shipped to their California destinations. Whether or not you are using zone skipping determines which table the system uses to identify the drop point.

The following table explains which indicia message prints on the pick slip.



For more information:

- About Zones
- Performing Pick Slip Generation
- Working with Drop Points (WDPT)
- Editing Warehouse Drop Points (EWDP)

How to display this screen: Select Indicia for a ship via code on the Work with Ship Via Screen.

Field	Description
Drop point	A code that identifies a location to which you ship packages. Drop points are used with the Zone Skipping feature. This feature enables you to ship a package by one carrier to a designated drop point, at which point another carrier picks up the package and delivers it to its final destination. With this method, the ultimate shipper crosses fewer zones. As a result, you reduce shipping charges because the charge is based on the number of zones crossed within the country. Drop point codes are defined in and validated against the Drop Point table; see Working with Drop Points (WDPT). *Numeric, 3 positions; optional.*
Description	The description associated with the indicia code. *Alphanumeric, 20 positions; optional.*
Number	The indicia code for the drop point, as defined by the carrier. *Alphanumeric, 20 positions; optional.*

Screen Option	Procedure
Enter the carrier's code for a drop point	Select Create to advance to the Create Ship Via Indicia Screen (Entering the Carrier's Indicia Information).

Screen Option	Procedure
Delete the carrier's code for a drop point	Select Delete for a record to advance to delete it.
Display the carrier's code for a drop point	Select Display for a record to advance to the Display Ship Via Indicia screen. You cannot change any information on this screen. See the Create Ship Via Indicia Screen (Entering the Carrier's Indicia Information) for field descriptions.

Create Ship Via Indicia Screen (Entering the Carrier's Indicia Information)

Purpose: Use this screen to create a ship via indicia.

How to display this screen: At the Work with Ship Via Indicia Screen, select Create

Field	Description
Ship via	The code for a shipper. Ship via codes are defined in and validated against the Ship Via table. *Numeric, 2 positions; required.*
Drop point	A code that identifies a location where you ship an item by one carrier and to be picked up by another carrier and shipped to its final destination. This is known as zone skipping. With this method, you reduce the number of zones crossed. As a result, you reduce the shipping charges. Drop point codes are defined in and validated against the Drop Point table; see Working with Drop Points (WDPT). *Numeric, 2 positions; required.*
Indicia description	The description of the indicia code, as defined by the carrier. *Alphanumeric, three lines of 20 positions each. First line required; remaining lines optional.*
Indicia number	The carrier's own code for the drop point specified. *Alphanumeric, 20 positions; required.*

Work with Dollar Chart by Ship Via Screen (Ship Via Service Charges)

Purpose: Use this screen to establish a chart for service charges to add to orders that use this shipper. The system bases the amount of the service charge on the merchandise total of the order, and calculates the service charge for each shipping address on the order. If the Include Handling in Freight Charge Calculation (D77) system control value is selected, the system also includes handling in the order total subject to service charges.

> **Note:**
>
> If the order uses the By Offer Price freight method, the system calculates the total merchandise value by adding the extended single-unit offer price for each item/SKU, disregarding any discounts, associate pricing, price overrides, quantity break pricing, etc. This merchandise value is used for both the freight and the ship via service charges.

Included in freight total: The system adds service charges by ship via to the *Freight* bucket on the order, and in general treats service charges the same way as freight, for example:

- overriding freight in Order Entry by selecting Charges also overrides service charges
- unselecting the *Calculate freight* field also prevents the system from calculating service charges

> **Note:**
>
> The service charges are included in the *Charges* field at the Alternate Shipping Charges by Via Window for the purposes of allowing the customer to select a best way shipper in order entry.

Source code requirements: To use service charges by ship via on an order, you must have the following defined for in Working with Source Codes (WSRC):

- the *Exclude service charges* field unselected
- an order level freight method:
  - $ Chart by Ofr = Freight by dollar chart/offer
  - $ Chart by Src = Freight by dollar chart/source
  - % Source = Freight by source code percentage
  - % Ship Via = Freight by ship via percentage
  - Recipient = Freight by recipient
  - Flat Rt/Ship To = Flat rate by ship-to
  - Order Weight = Freight by order weight
  - By Offer Price = Freight by offer price

How to display this screen: Select Service Charges for a ship via at the Work with Ship Via Screen.

Field	Description
Ship via	A code for the shipper. *Numeric, 2 positions; display-only.*
Description (Unlabeled field to the right of the ship via)	The name of the shipper. *Alphanumeric, 30 positions; display-only.*
Dollar amount	The merchandise total of the order required to add this service charge to the order. The system will also include handling in the total subject to service charges if the Include Handling in Freight Charge Calculation (D77) Control value is selected. The system adds the service charge dollar amount or percentage to orders whose totals are at least this amount, but less than the next larger dollar amount you have defined. *Numeric, 13 positions with a 2-place decimal; optional.*
Service charge	The amount of service charge to add to an order for the associated dollar amount. *Numeric, 13 positions with a 2-place decimal; optional.*

Field	Description
Pct (Percentage)	The percentage to use when calculating the service charge to add to an order for the associated dollar amount. *Numeric, 5 positions with a 2-place decimal; optional.*
Maximum charge	The maximum service charge to add to an order. *Numeric, 13 positions with a 2-place decimal; optional.*

Screen Option	Procedure
Create a service charge	Select Create to advance to the Create Dollar Chart by Ship Via Screen (Service Charge Dollar Chart).
Change a service charge	Select Change for a service charge record to advance to the Change Dollar Chart by Ship Via screen. You can change any information except the dollar amount. See Create Dollar Chart by Ship Via Screen (Service Charge Dollar Chart) for field descriptions.
Delete a service charge	Select Delete for a service charge record to delete it. You can delete a service charge dollar chart record even if the charge has been added to orders.
Display a service charge	Select Display for a service charge record to advance to the Display Dollar Chart by Ship Via screen. You cannot change any information on this screen. See Create Dollar Chart by Ship Via Screen (Service Charge Dollar Chart) for field descriptions.

Create Dollar Chart by Ship Via Screen (Service Charge Dollar Chart)

Purpose: Use this screen to create a service charge by dollar chart record. Each record defines the amount or percentage service charge to add to an order whose merchandise total is at least as large as the dollar amount, but not as large as the next higher dollar amount on the chart. See Work with Dollar Chart by Ship Via Screen (Ship Via Service Charges) for more information on how the system applies service charges to orders.

How to display this screen: Select Create at the Work with Dollar Chart by Ship Via Screen (Ship Via Service Charges).

Field	Description
Ship via	The code representing a shipper. *Numeric, 2 positions; display-only.*
Description (Unlabeled field to the right of the ship via code)	The name of the shipper. *Alphanumeric, 30 positions; display-only.*

Field	Description
Dollar amount	The required amount of the order subject to the service charge. The system adds the service charge amount or calculates the service charge percentage to orders whose merchandise totals are at least this dollar amount, but less than the next higher dollar amount defined in the dollar chart. The system will also include handling in the total subject to service charges if the Include Handling in Freight Charge Calculation (D77) field in the System Control table is selected. *Numeric, 13 positions with a 2-place decimal.* *Create screen: required.* *Change screen: display-only.*
Service charge	The total service charge to add to an order for this dollar amount. You must define either a service charge dollar amount here, or a service charge percentage, but not both. *Numeric, 13 positions with a 2-place decimal; required if not entering a service charge percentage.*
Service charge % (Service charge percentage)	The percentage to use for calculating the service charge to add to an order. The system bases the percentage on the dollar amount subject to freight on the order (generally the merchandise amount; see the *Dollar amount* field description above). Example: If the service charge percentage for a dollar amount of $100.00 is 5.00, and the dollar amount on the order is also $100.00, the system adds a $5.00 service charge to the order (5% of 100). *Numeric, 5 positions with a 2-place decimal; required if not entering a service charge amount.*
Maximum charge	The maximum service charge to add to an order. Typically, you would define a maximum for the highest record on your dollar chart. Example: If the highest dollar amount were $200.00 with a service charge percentage of 4%, you might define a maximum charge of $10.00. *Numeric, 13 positions with a 2-place decimal; optional.*

Work with Weight Charges by Ship Via Screen

Purpose: Use this screen to create a chart for weight charges to add to orders that use this shipper. The system bases the amount of the weight charge on the total weight of the merchandise on the order, and calculates the weight charge for each shipping address on the order.

Determining the order weight: The system uses the weight defined in the *Sell weight* field for each item on the order to determine the order weight. For example, if the first item on the order weighed 2 pounds and the second item on the order weighed 6 pounds, the order weight would be 8 pounds. The system adds the weight of items for each ship to customer separately.

Determining the weight charge: Once the system determines the weight of the items on the order, the system looks at the order weight charge table set up for the ship via defined for the order ship to. The system finds the order weight defined in the order weight charge table that is at least this order weight, but less than the next larger order weight you have defined.

Included in freight total: The system adds weight charges by ship via to the Freight bucket on the order, and treats the weight charges the same way as freight, for example:

- overriding freight in order entry by selecting Charges also overrides weight charges
- unselecting the Calculate freight field also prevents the system from calculating weight charges

> **Note:**
>
> The weight charges are included in the *Charges* field at the Alternate Shipping Charges by Via Window for the purposes of allowing the customer to select a best way shipper in order entry.

Source code requirements: To use weight charges by ship via on an order, you must have an order level freight method defined for the source code. Order level freight methods are:

- $ Chart by Ofr = Freight by dollar chart/offer
- $ Chart by Src = Freight by dollar chart/source
- % Source = Freight by source code percentage
- % Ship Via = Freight by ship via percentage
- Recipient = Freight by recipient
- Flat Rt/Ship To = Flat rate by ship-to
- Order Weight = Freight by order weight
- By Offer Price = Freight by offer price

See Working with Source Codes (WSRC), for more information on order level freight methods.

Example:

You enter an order with 2 ship-to customers. Ship-to customer 1 uses ship via 3, and ship-to customer 2 uses ship via 4. The order weight for ship-to customer 1 is 9 lbs. and the order weight for ship to customer 2 is 13 lbs.

Ship Via 3 Weight Charges Table		**Ship Via 4 Weight Charges Table**	
Order Weight	**Weight Charge**	**Order Weight**	**Weight Charge**
5 lbs.	0.50	5 lbs.	1.00
10 lbs.	1.00	10 lbs.	2.00
15 lbs.	1.50	15 lbs.	3.00

Results:

Order #	Ship to #	Ship Via	Order Weight	Weight Charge	Freight Charges	Order Ship To Freight
3557	1	3	9 lbs.	.50	1.00	1.50
3557	2	4	13 lbs.	2.00	1.50	3.50

How to display this screen: On the Work with Ship Via Screen, select Weight Charges for a ship via code.

Field	Description
Ship via	The code and description of the shipper you selected on the Work with Ship Via Screen. This is the shipper for which you wish to add a charge to an order based on the weight of the merchandise. *Ship via code: Numeric, 2 positions; display-only.* *Ship via description: Alphanumeric, 30 positions; display-only.*
Order weight	The total weight to the items on the order. The system looks at the *Sell weight* field for an item to determine the item's weight. The system adds the weight charge to orders whose order weight is at least this weight, but less than the next larger order weight you have defined. *Numeric, 13 positions with a 2-place decimal; optional.*
Weight charge	The charge you apply to the order based on the weight of the items on the order. *Numeric, 13 positions with a 2-place decimal; optional.*

Screen Option	Procedure
Create an order weight charge	Select Create to advance to the Create Weight Charges by Ship Via Screen (Order Weight Charges).
Change an order weight charge	Select Change for an order weight charge to advance to the Change Weight Charges by Ship Via screen. At this screen you can change the *Weight charge* field. See Create Weight Charges by Ship Via Screen (Order Weight Charges) for a description of the fields on this screen.
Delete an order weight charge	Select Delete for an order weight charge to delete it.
Display an order weight charge	Select Display for an order weight charge to advance to the Display Weight Charges by Ship Via screen. You cannot make any changes on this screen. See Create Weight Charges by Ship Via Screen (Order Weight Charges) for field descriptions.

Create Weight Charges by Ship Via Screen (Order Weight Charges)

Purpose: Use this screen to create a weight charge you can add to an order based on the weight of the items on the order.

How to display this screen: On the Work with Weight Charges by Ship Via Screen, select Create.

Field	Description
Ship via	The code and description of the shipper for which you are creating an order weight charge. *Ship via code: Numeric, 2 positions; display-only.* *Ship via description: Alphanumeric, 30 positions; display-only.*
Order weight	The weight of all of the items on the order. The system chooses the order weight in the table that is at least the order weight, but less than the next larger order weight defined. *Numeric, 13 positions with a 2-place decimal.* *Create screen: required.* *Change screen: display-only.*
Weight charge	The charge you wish to add to the order based on the order weight. The 13 adds the order weight charge to the Freight field on the order. *Numeric, 8 positions with a 2-place decimal; required.*

Working with SCF Codes (WSCF)

Sectional Center Facility (SCF) codes represent the first 3 digits of the destination postal (zip) code. The Work with SCF function allows you to enter information specific to the SCF, including the valid states, the preferred method of shipping to this area, and a warehouse list which defines a hierarchy for reserving merchandise in warehouses.

Shipping address validation: The system uses the SCF table to validate that the customer's postal code and state are consistent. For example, if you set up an SCF of 011 for the state of MA, but no other states, the system prevents you from entering a customer address with a postal code that starts with 011, but a state of CT. This validation occurs in order entry, customer maintenance, and other functions where you enter name and address information. However, there are a few functions where this validation does not occur, including Working with Customer Fraud Tables (WCFD), Working with Vendors (WVEN) (except for working with vendor FOB), and Working with Companies (WCMP).

> **Note:**
>
> SCF validation occurs only if the customer's address include a postal code and state. These fields are optional if the *Require postal code?* or *Require state?* flags for the country are unselected.

Tax information: An important function of the SCF Tax Rate table, accessible through the Work with SCF function, is to define the tax rate that applies to orders shipped to this SCF. For Canadian SCFs, you can define GST and/or PST rates, and a calculation method.

You can also define tax information at the postal code level. See Setting Up the Zip/City/State (Postal Code) Table (WZIP) for more information and flow charts depicting the tax hierarchy.

The steps in which the system determines a customer's tax rate vary, depending on the setting of the Tax Included in Price (E70) system control value:

- unselected = The system first checks the VAT % defined for the country where the order is being shipped. If there is no rate defined for the country, the system checks the rate for the postal code. If there is no postal code tax information, the system checks the SCF Tax Rate table.
- selected = If the state is exempt from VAT, the system checks the postal code rate first. If there is no tax information for the postal code, the system checks the SCF Tax Rate table. If the order is subject to VAT, tax-inclusive prices are used on the order and a hidden tax is included in the order line detail.

You can also define tax exemptions or exceptions for certain items in particular states in the United States, or in Canadian provinces. See Working with Item Tax Exemptions (WITX) and Working with GST Tax Exemption Status (MGTX). Additionally, a customer can be tax- or VAT-exempt; see Working with Customer Tax Status. Also, you can exempt special handling from tax by setting the S/H exclude tax? field for the additional charge code; see Establishing Additional Charge Codes (WADC).

Geographic zone information: The SCF table can be used to identify the geographic zone of a shipping address. Geographic zones are used to divide the country into shipping regions for the purpose of restricting the shipment of weather-sensitive inventory such as plant stock. See Shipping Zone Reservation Overview.

The SCF information you enter through this menu option is unique to a particular company, unlike the information in the Zip/City/State table. Information entered through Setting Up the Zip/City/State (Postal Code) Table (WZIP) applies to all companies on your system; information entered through Work with SCF Codes applies only to the company for which it is set up.

If the postal code is optional for a country: If the *Require postal code?* flag for a country is unselected, it is not necessary to specify a postal or zip code for a customer address; however, if the country has the *Perform ship via edit?* flag selected, the system still needs to validate the SCF/ship via combination for an order. See If the Postal Code is Optional for a Country for a discussion, and see Setting Up the Country Table (WCTY) for more information about the address validation settings available for countries.

In this topic:

- Work with SCF Codes Screen
  - Create SCF Screen
- Work with SCF Tax Rates Screen (Change Mode)

Work with SCF Codes Screen

How to display this screen: Enter WSCF in the *Fast path* field at the top of any menu or select Work with SCF Codes from a menu.

Field	Description
Country	A code for the country associated with this SCF. Country codes are defined in and validated against the Country table; see Setting Up the Country Table (WCTY). *Alphanumeric, 3 positions; optional.*
SCF (Sectional Center Facility)	A code that represents the first 3 digits of a postal code. *Alphanumeric, 3 positions; optional.*

Field	Description
State # 1	The primary state or province associated with this SCF. *Alphanumeric, 2 positions; optional.*
State # 2	The second state or province associated with this SCF. *Alphanumeric, 2 positions; optional.*
State # 3	The third state or province associated with this SCF. *Alphanumeric, 2 positions; optional.*
State # 4	The fourth state or province associated with this SCF. *Alphanumeric, 2 positions; optional.*
State # 5	The fifth state or province associated with this SCF. *Alphanumeric, 2 positions; optional.*
Warehouse list	The warehouse list to use for orders to this SCF. If the Ship Complete from 1 Warehouse (B16) system control value is selected, the system searches warehouses in the sequence specified in the list for inventory to fulfill an order. You can set up warehouse lists to make fulfillment more efficient and save on shipping costs. See Working with Warehouse Lists (WWHL) for an explanation of warehouse list logic. *Numeric, 2 positions; optional.*
Ship via	The preferred ship via for this SCF. The system changes the ship via on the order header to this ship via unless another override takes precedence; however, the *Allow auto assignment* flag for the ship via controls whether this automatic assignment takes place. See Ship Via Override Hierarchy for a list of ways the system can override the shipper specified on the order with another shipper and the hierarchy in which the ship via overrides take precedence. *Numeric, 2 positions; optional.*
Geographic zone	A code representing a region of the country. Geographic zones are used to divide the country into shipping regions for the purpose of restricting the shipment of weather-sensitive inventory such as plant stock. Geographic zones are used in conjunction with zone reservation codes, assigned to items or SKUs, to control item reservation in order entry. Zone reservation coded items/SKUs are not reserved during order entry; instead they are reserved during pick generation, at an optimal time for shipping. Zone reservation logic requires: • The item/SKU must be assigned a zone reservation code • The offer associated with the order must be assigned a season code • The shipping address for the order must be assigned to a geographic zone, using either the postal zip code of the ship to address, or the SCF code of the ship to address. • For each zone reservation code, you must define zone date windows for all geographic zones in the country See Shipping Zone Reservation Overview. *Alphanumeric, 3 positions; optional.*

Field	Description
Store tax code	The cross-reference to the corresponding tax code in a point-of-sale system. This field is available only if the Default Location for ORCE Integration (K69) system control value is populated. *Alphanumeric, 8 positions; optional.*

Screen Option	Procedure
Create a new SCF code	Select Create to advance to the Create SCF Screen.
Change an SCF code	Select Change for an SCF code to advance to the Change SCF screen. At the Change screen you can change any information except the SCF code. See Create SCF Screen for field descriptions.
Delete an SCF code	Select Delete for an SCF code to delete it.
Display an SCF code	Select Display for an SCF code to advance to the Display SCF screen. You cannot change any information on this screen. See Create SCF Screen for field descriptions.
Work with tax rates	Select Work with tax rates for an SCF to advance to the Work with SCF Tax Rates Screen (Change Mode).

Create SCF Screen

Purpose: Use this screen to create an SCF code.

How to display this screen: At the Work with SCF Codes Screen, select Create.

Field	Description
Country code	A code for the country associated with this SCF code. Country codes are defined in and validated against the Country table; see Setting Up the Country Table (WCTY). *Alphanumeric, 3 positions; required.*
SCF	The first 3 digits of the destination postal code. *Alphanumeric, 3 positions.* *Create screen: required.* *Change screen: display-only.*
Valid state 1	The primary state or province associated with this SCF. If you are defining an SCF for a country that does not require state or province codes, you can enter ** in this field. *Alphanumeric, 2 positions; required.*
Valid state 2	The second state or province associated with this SCF. *Alphanumeric, 2 positions; optional.*

Field	Description
Valid state 3	The third state or province associated with this SCF. **Note:** The system does not validate that your entries for the first and second states are different from the third, fourth and fifth states. *Alphanumeric, 2 positions; optional.*
Valid state 4	The fourth state or province associated with this SCF. *Alphanumeric, 2 positions; optional.*
Valid state 5	The fifth state or province associated with this SCF. *Alphanumeric, 2 positions; optional.*
Preferred ship via	A code that represents a carrier for an order, such as UPS or USPS. This Ship Via defaults in Order Entry if the ship-to address on the order is for this SCF and a default ship via has not been defined on the Default Values for Orders screen. This default may be overridden by another ship via override; however, the preferred ship via for the SCF does not override the current ship via on the order if the current ship via's Allow auto assignment field is unselected. See Ship Via Override Hierarchy for a list of ways the system can override the shipper specified on the order with another shipper and the hierarchy in which the ship via overrides take precedence. Ship via codes are defined in and validated against the Ship Via table; see Working with Ship Via Codes (WVIA). *Numeric, 2 positions; optional.*
Warehouse list	A code that represents a warehouse list used to specify the sequence in which reservation warehouses should be searched for inventory, based on the SCF where the order will be shipped. The system refers to the warehouse list during Batch and Immediate Reservation and when evaluating backorders if the Ship Complete from 1 Warehouse (B16) system control value is selected. If this system control value is unselected, the system first reserves stock from the primary warehouse in the item table, and, if there is not enough available stock in the item's primary warehouse, reserves stock from the warehouses on the list. See Working with Warehouse Lists (WWHL) for an explanation of the logic the system uses in assigning warehouses from warehouse lists, and for information on defining warehouse lists. *Alphanumeric, 2 positions; optional.*

Field	Description
Geographic zone	A code representing a region of the country. Geographic zones are used to divide the country into shipping regions for the purpose of restricting the shipment of weather-sensitive inventory such as plant stock. Geographic zones are used in conjunction with zone reservation codes, assigned to items or SKUs, to control item reservation in order entry. Zone reservation coded items/SKUs are not reserved during order entry; instead they are reserved during pick generation, at an optimal time for shipping. Zone reservation logic requires: • The item/SKU must be assigned a zone reservation code • The offer associated with the order must be assigned a season code • The shipping address for the order must be assigned to a geographic zone, using either the postal ZIP code of the ship to address, or the SCF code of the ship to address. • For each zone reservation code, you must define zone date windows for all geographic zones in the country See Shipping Zone Reservation Overview. *Alphanumeric, 3 positions; optional.*
Store tax code	The cross-reference to the corresponding tax code in a point-of-sale system. This field is available only if the Default Location for ORCE Integration (K69) system control value is populated. *Alphanumeric, 8 positions; optional.*

Work with SCF Tax Rates Screen (Change Mode)

Purpose: Use this screen to review or work with tax rate information for an SCF. This screen includes historical information regarding when tax rules became effective for the SCF; however, only the most current SCF tax rate record, which displays at the top of the list, is currently in effect.

> **Note:**
>
> The system does not consider the settings at this screen if you use an external tax system unless the Use Standard Tax Calc if Tax Interface Communication Fails (J13) system control value is selected and the integration with the tax system fails.

How to display this screen: Select Work with tax rates for an SCF at the Work with SCF Codes Screen

Field	Description
Effect date (Effective date)	The date that this tax rate became effective. *Numeric, 6 positions (in user date format); display-only.*

Field	Description
Tax rate %	The default tax rate for this SCF. You can also define a tax rate for a postal code or for a country; for a description of the way that the system determines the tax rate that applies to an order see Working with SCF Codes (WSCF). If you are using an external tax system to calculate tax, you would enter a tax rate of 100%. *Numeric, 5 positions with a 2-place decimal; optional.*
GST rate %	The default Canadian Goods and Services Tax (GST) rate for this SCF. You can also define a GST rate at the postal code level; the way that the system determines the tax rate that applies to an order is described earlier in this topic. If you are using an external tax system to calculate tax, you would enter a tax rate of 100%. If this field is blank but the SCF tax rates would normally apply to the order, the system uses the default GST Rate (A90) in the System Control table. *Numeric, 5 positions with a 2-place decimal; optional.*
PST rate %	The default Canadian Provincial Services Tax (PST) rate for this SCF. You can also define a PST rate at the postal code level; the way that the system determines the tax rate that applies to an order is described earlier in this topic. If you are using an external tax system to calculate tax, you would enter a tax rate of 100%. *Numeric, 5 positions with a 2-place decimal; optional.*
GST/PST method	Determines the sequence in which the Canadian Goods and Services Tax (GST) and the Provincial Services Tax (PST) are calculated. If you do not define a calculation method, the system does not charge either GST or PST on orders to this SCF even if you have defined GST or PST rates. Valid GST/PST tax calculation methods: • blank = none • **GST** • **PST** • **Separate** *Optional.*

Field	Description

Tax method	System calculation	Result
GST	GST is calculated first, then PST, as follows: GST taxable amount includes merchandise and freight, if applicable. PST taxable amount includes merchandise and freight, if applicable PLUS the GST amount from the first calculation.	GST is subject to PST.
PST	PST is calculated first, then GST, as follows: PST taxable amount includes merchandise and freight, if applicable. GST taxable amount includes merchandise and freight, if applicable PLUS the PST amount from the first calculation.	PST is subject to GST.
Blank	GST and PST will not be calculated for this postal code.	---

Tax freight

Indicates whether there is a tax on freight in this SCF. This is controlled by state or province regulations in each jurisdiction.

Valid values:

Yes = Any dollar amount in the *Freight* and *Freight +* fields on the order is taxed.

No = Any dollar amount in the *Freight* and *Freight +* fields on the order is not taxed.

Note:

Acts as an override to the Tax on Freight (B14) field in the System Control table if the system control value is selected. If the order uses the tax rate for the postal code, but the *Tax freight* field is unselected, the system uses the value from the System Control table. If the system control value is unselected, you cannot override this value by selecting it here.

Field	Description
Tax handling	The value indicates whether there is a tax on handling in this SCF. This is controlled by state or province regulations in each jurisdiction. Valid values: Yes = Any dollar amount in the *Handling* field on the order, with the exception of duty, is taxed. No = Any dollar amount in the *Handling* field on the order is not taxed. • Acts as an override to the Tax on Handling (B15) field in the System Control table if the system control value is selected. If the order uses the tax rate for the SCF, but the *Tax handling* field is blank, the system uses the value from the System Control table. If the system control value is unselected, you cannot override this value by selecting it here. • If the S/H exclude tax? field for the special handling code is selected, the handling charge is not evaluated for tax. • You can override this setting by a setting at the zip code level; see Setting Up the Zip/City/State (Postal Code) Table (WZIP).

Screen Option	Procedure
Change existing tax rate information	Use the Tab key to advance to the tax information you want to change and type over it. Select Update when you are done.
Add new tax rate detail	Select Add to advance to the Work with SCF Tax Rates screen in Add mode. Use this screen to add a new SCF tax record. See above for field descriptions.
Delete a tax rate record	Select Delete for the tax rate record you want to delete. The system deletes the record immediately without displaying a confirmation message.

Working with SCF/Ship Via Values (WSHV)

Purpose: A Sectional Center Facility (SCF) code represents the first 3 digits of the destination postal code. A Ship Via code is used to indicate the areas (postal codes) where shippers deliver merchandise.

Ship via edit? The system uses this information in order entry, order maintenance, and the order API to ensure that the shipper assigned to the order can deliver to the shipping address on the order. If the *Perform ship via edit?* flag is selected for a country, you must create a record for every valid Ship Via/SCF combination. In this situation, if a record does not exist for the ship via on an order and the SCF of the shipping address, Order Entry displays a message such as: `Ship via (11) is not valid with ship to zip code (088).`

Use the Work with SCF Ship Via Values screen to work with SCF/ship via values. You can also create SCF/ship via values using Creating SCF Ship Vias by SCF Range (MSSV) or Editing SCF Ship Via (ESSV).

> **Note:**
>
> If the *Perform ship via edit?* flag is unselected for a country, it is not necessary to create SCF Ship Via values for that country. See Setting Up the Country Table (WCTY) for more information.

In this topic:

- If the Postal Code is Optional for a Country
- Work with SCF Ship Via Values Screen
- Create SCF Ship Via Screen

If the Postal Code is Optional for a Country

If the *Require postal code?* flag for a country is unselected, you do not need to specify a postal or zip code for a customer address; however, if the country has the *Perform ship via edit?* flag selected, the system still validates the SCF/ship via combination for an order even when the address does not include a postal code. To do so, the system uses a default SCF code of # as a "wild card" SCF for SCF/ship via validation.

Example: You create an order for a customer from Ireland, where the postal code is optional. The customer's address does not include a postal code. If you select the *Perform ship via edit?* flag for Ireland and enter a ship via code of 22, the system validates that there is an SCF/ship via record for an SCF of # and a ship via code of 22.

Setup: If you will create orders for customers in a country that does not require a postal code, use Working with SCF Codes (WSCF) to make sure that there is an SCF record for the country with an SCF code of #. You can then create SCF/ship via records for the # (wild card) SCF and each valid ship via for the country. It is not necessary to create a postal code record for the # SCF, or assign it to customer addresses.

See Setting Up the Country Table (WCTY) for more information about the address validation settings available for countries.

Work with SCF Ship Via Values Screen

How to display this screen: Enter WSHV in the *Fast Path* field at the top of any menu, or select this option from a menu.

Field	Description
SCF code (Sectional Center Facility)	A code that represents the first 3 digits of a postal code. An SCF code of # serves as a "wild card" for countries where a postal code is optional. See If the Postal Code is Optional for a Country for more information. *Alphanumeric, 3 positions; optional.*
Ship via	A code that represents the shipper; see Working with Ship Via Codes (WVIA). *Numeric, 2 positions; optional.*
Drop point	A code that represents one of your shipping warehouses or a central location to ship merchandise for consolidation; see Working with Drop Points (WDPT). *Numeric, 3 positions; optional.*

Field	Description
Ship zone	The zone within the country where the package is being shipped in relation to the drop point. *Numeric, 2 positions; optional.*
Shipping lead days	The number of days it takes the shipper to deliver merchandise to this SCF. **Calculation for pick slip preparation:** The system uses this number in conjunction with your internal lead days to determine when to generate pick slips for an order. The calculation is: `Arrival Date from Order Line (or Order Ship To) - (Pick Processing Days (B37) + Ship Via Lead Days in WSHV) < or = Today's Date` The system does not exclude weekends/holidays in its calculation. See Selecting Order Lines for Pick Slip Preparation. **Calculation for Alternate Shipping Charges by Via window:** The system also uses this setting to calculate the Ship lead days and Expected delivery date to display at the Alternate Shipping Charges by Via Window in order entry, and this window uses a different calculation than the one described above. See the description of the Alternate Shipping Charges by Via Window for more information. *Numeric, 3 positions; optional.*

Screen Option	Procedure
Create a new SCF ship via value	Select Create to advance to the Create SCF Ship Via Screen.
Change an SCF ship via value	Select Change for an SCF/ship via value to advance to the Change SCF Ship Via screen. You can change only the *Shipping zone* and *Shipping lead days* fields on this screen. See Create SCF Ship Via Screen for field descriptions.
Delete an SCF ship via value	Select Delete for an SCF/ship via value to delete it.
Display an SCF ship via value	Select Display for an SCF/ship via value to advance to the Display SCF Ship Via screen. You cannot change any information on this screen. See Create SCF Ship Via Screen for field descriptions.

Create SCF Ship Via Screen

To create an SCF ship via value: At the Work with SCF Ship Via Values Screen, select Create.

Field	Description
SCF code	The first 3 positions of the destination postal code. An SCF code of # serves as a “wild card” for countries where a postal code is optional. See If the Postal Code is Optional for a Country for more information. Validated against the SCF table; see Working with SCF Codes (WSCF). *Alphanumeric, 3 positions.* *Create screen: required.* *Change screen: display-only.*
Ship via code	The shipper to deliver merchandise to the customer, such as 01 (UPS). Validated against the Ship Via table; see Working with Ship Via Codes (WVIA). *Numeric, 2 position.* *Create screen: required.* *Change screen: display-only.*
Drop point	A code that represents one of your shipping warehouses or a central location to which merchandise will be shipped for consolidation. Drop points are used in zone skipping, which enables you to ship a carton by one carrier to a drop point, where another carrier picks up the carton and delivers it to its final destination. **Note:** If you are using the freight by order weight freight method, the drop point you define here must match the drop point you define in the Warehouse table. See Working with Weight Tables for Order Weight (WFTB). *Numeric, 3 positions.* *Create screen: required.* *Change screen: display-only.*
Shipping zone	The zone within the country where the carton is being shipped in relation to the drop point. Shipping zones are sections of the country that are defined by UPS. See About Zones. *Numeric, 2 positions; required.*

Field	Description
Shipping lead days	The number of days it takes the shipper to deliver merchandise to this SCF. **Calculation for pick slip preparation:** The system uses this number in conjunction with your internal lead days to determine when to generate pick slips for an order. The calculation is: `Arrival Date from Order Line (or Order Ship To) - (Pick Processing Days (B37) + Ship Via Lead Days in WSHV) < or = Today's Date` The system does not exclude weekends/holidays in its calculation. See Selecting Order Lines for Pick Slip Preparation. **Calculation for Alternate Shipping Charges by Via window:** The system also uses this setting to calculate the Ship lead days and Expected delivery date to display at the Alternate Shipping Charges by Via Window in order entry, and this window uses a different calculation than the one described above. See the description of the Alternate Shipping Charges by Via Window for more information. *Numeric, 3 positions; optional.*

Creating additional SCF/ship vias: After creating an SCF/ship via combination, select Duplicate Create to create the next. To make creating the next SCF/ship via easier, the screen retains all of the values from the previous SCF/ship via except the *Ship via code* and the *Drop point*.

Working with Shipping Rates (WSHR)

Purpose: You can use the Work with Shipping Rates menu option to set shipping rates for:

- charges you pay to a shipper for shipping a package to a customer; used when calculating best way shipping during pick slip generation
- charges to add to orders that use the Freight by Weight method (W), as defined in the source code on the order header; used during order entry and maintenance (

> **Note:**
>
> You do not use this menu option to work with rates for the Freight by Order Weight method (OW); see Working with Weight Tables for Order Weight (WFTB).

)

Each is described in this topic.

Shipping rate definition includes the ship via, delivery code (residential, business, or neither), shipping zone, and weight.

Round up or down? The system rounds the total weight of the order or pick slip up or down to the next whole pound. For best way shipping at pick slip generation, the system always rounds the total weight up. However, for Freight by Weight, the system rounds up if the weight ends in .50 or greater; the system rounds down if the weight ends in .49 or less.

> **Note:**
>
> The shipping rate must match the ship via, delivery code, zone and rounded-up weight exactly to apply to the order or pick slip. For example, if the total order weight is 11.5 pounds, and there is not a matching shipping rate for 12 pounds, the shipping rate will not apply for either best way shipping or Freight by Weight. When you are using Freight by Weight, no shipping rate will apply for shipments weighing .49 of a pound or less.

In this topic:

- Freight by Weight
- Work with Shipping Rates Screen
  - Create Shipping Rate Screen

Freight by Weight

Freight by weight is a freight method using the charges a customer pays you for shipping an order based on the total selling weight of the items. Evaluation for this freight method takes place during order entry or order maintenance.

To use freight by weight:

- set the freight method for a source code to Freight by Weight (W); see Working with Source Codes (WSRC)
- create shipping rates for each ship via; see Work with Shipping Rates Screen
- set the Sell weight for the item in Work with Item/SKUs; see Performing Initial Item Entry (MITM).

The total weight is rounded up for the purposes of freight by weight if the partial pound is .50 or more; otherwise, the total weight is rounded down. For example, if the total weight is 3.51 pounds, the 4 pound rate is used; if the total weight is 3.49 pounds, the 3 pound rate is used. Because partial pounds of .49 or lower are rounded down, no freight will be added to the order if the total weight is under a half pound.

Example: You are shipping an order to a business address in zip code 01760. The ship via on the order is 01, and the total weight of the shipment is 4.5 pounds. The shipping rate for ship via 01, zone 01 (for 01760), and 5 pounds is $2.00.

If the total shipping weight in the above example were 4.4 pounds, the system would round this total down and use the 4 pound shipping rate.

Work with Shipping Rates Screen

Purpose: Use this screen to work with shipping rates for freight by weight or best way shipping.

How to display this screen: Enter WSHR in the *fast path* field at the top of any menu, or select Work with Shipping Rates from a menu.

Field	Description
Ship via	A code that represents the shipper. *Numeric, 2 positions; optional.*
Delivery Code	A code that indicates the type of address for delivery. Valid values are: • **Business** • **Residential** • No Distinction **Note:** Not a valid delivery code for UPS Certain shippers use the delivery code to determine shipping rates, charging a different rate for a delivery to a business address. *Optional.*
Weight	The weight of the shipment. *Numeric, 13 positions with a 3-place decimal; optional.*
Zone	The shipping zone within the country where the shipping rate applies. See About Zones. *Numeric, 2 positions; optional.*
Rate	The charge to ship the package. *Numeric, 13 positions with a 2-place decimal; optional.*

Screen Option	Procedure
Create a new shipping rate	Select Create to advance to the Create Shipping Rate Screen.
Change a shipping rate	Select Change for a shipping rate to advance to the Change Shipping Rate screen. At this screen, you can change only the rate. See Create Shipping Rate Screen for field descriptions.
Delete a shipping rate	Select Delete for a shipping rate and select OK to delete it.
Display a shipping rate	Select Display for a shipping rate to advance to the Display Shipping Rate screen. You cannot change any information on this screen. See Create Shipping Rate Screen for field descriptions.

Create Shipping Rate Screen

How to display this screen: At the Work with Shipping Rates Screen, select Create.

Field	Description
Ship via	The shipper that will deliver merchandise to the customer. Ship via codes are defined in and validated against the Ship Via table. See Working with Ship Via Codes (WVIA). *Numeric, 2 positions.* *Create screen: required.* *Change screen: display-only.*
Delivery code	This code identifies a business (commercial) or residential address. Used when shipping an order by a carrier that uses business or consumer rate tables (e.g., UPS). A code that indicates the type of address for delivery. Valid values are: • **Business** • **Residential** • No Distinction **Note:** Not a valid delivery code for UPS Certain shippers use the delivery code to determine shipping rates, charging a different rate for a delivery to a business address. *Create screen: required.* *Change screen: display-only.*
Weight	The total weight of the shipment. The system uses the *Sell weight* (for Freight by Weight) defined in the Item table to calculate the total shipping weight for all units of each item included in the shipment. The system may round the total weight up or down to find a match in the shipping rate table; see the description Freight by Weight. You must define a shipping rate for each whole pound to have the system use the shipping rate. For example, if the total weight of the items is 3.75 pounds, the system uses the shipping rate defined for 4 pounds. If there is no matching shipping rate record for 4 pounds, then best way shipping or freight by weight will not apply. When you are using Freight by Weight, no shipping rate will apply for shipments weighing .49 of a pound or less. *Numeric, 13 positions with a 3-place decimal.* *Create screen: required.* *Change screen: display-only.*
Zone	The geographic zone where the merchandise is being shipped in relation to the drop point. See About Zones. *Numeric, 2 positions.* *Create screen: required.* *Change screen: display-only.*
Rate	The shipping charge for this weight. In the case of freight by weight, this is the freight charge to add to the order. *Numeric, 13 positions with a 2-place decimal; required.*

Working with Drop Points (WDPT)

Drop points represent locations to which merchandise will be shipped from your warehouse. Typically, a drop point represents the address of a UPS facility. This drop point prints as the return address on the pick slip and is the destination to which undeliverable packages are returned. Drop points are also used to indicate the warehouse from which the merchandise was shipped. This is necessary in a multi-warehouse environment to determine the shipping zone. Each warehouse is assigned a drop point in the Warehouse table.

In this topic:

Zone Skipping

Drop points are used in zone skipping. Zone skipping is used to deliver packages to a pre-assigned drop point by one carrier and picked up by another carrier who will deliver it to its final destination. Shipping charges are determined by the number of zones crossed; therefore, using zone skipping reduces delivery charges because less zones within the country are crossed.

Work with Drop Point Screen

Purpose: Use this screen to create, change, delete, or display drop points.

How to display this screen: Enter WDPT in the *Fast Path* field at the top of any menu.

Field	Description
Drop point	A code that represents a drop point. *Numeric, 3 positions; optional.*
Description	The description of the drop point. *Alphanumeric, 30 positions; optional.*

Screen Option	Procedure
Create a new drop point	Select Create to advance to the Create Drop Point Screen.
Change a drop point	Select Change for a drop point to advance to the Change Drop Point screen. At the Change screen you can change any information except the Drop Point code. See Create Drop Point Screen for field descriptions.
Delete a drop point	Select Delete for a drop point to delete it.
Display a drop point	Select Display for a drop point to advance to the Display Drop Point screen. You cannot change any information on this screen. See Create Drop Point Screen for field descriptions.

Create Drop Point Screen

Purpose: Use this screen to create a drop point.

How to display this screen: At the Work with Drop Point Screen, select Create.

Field	Description
Drop point	A code that represents a location to which merchandise will be shipped from your warehouse, and a unique code assigned to each warehouse to indicate that merchandise is shipped directly from the warehouse to its final destination. • Each warehouse must be assigned to a drop point. • Drop points can be UPS facilities. • Drop points print as the return address on the pick slip and are the destination to which undeliverable packages are returned. • Drop points are used in zone skipping. *Numeric, 3 positions.* *Create screen: required.* *Change screen: display-only.*
Description	The description of the drop point. *Alphanumeric, 30 positions; required.*
Address	The delivery address for this drop point, which may represent the shipping address to a UPS facility. This text prints as part of the return address on the pick slip. *Alphanumeric, 30 positions; required.*
City	The city name for this drop point, which may represent the city in which a UPS facility is located. This text prints as part of the return address on the pick slip. *Alphanumeric, 25 positions; required.*
State/zip/country	The state, zip code, and country in which this drop point is located. The state/zip/country may represent a UPS location. This text prints as part of the return address on the pick slip. *Alphanumeric, 2 positions (state), 9 positions (zip), and 3 positions (country); required.*

Editing Warehouse Drop Points (EWDP)

Purpose: Editing warehouse drop points is used to update warehouse, ship via, SCF, and drop point information all at once, rather than entering this information for each warehouse, drop point, etc.

This function is used only in zone skipping. If you do not use zone skipping in your organization, you should not be concerned with editing warehouse drop points. See Work with Ship Via Indicia Screen.

Drop points represent locations to which merchandise will be shipped from your warehouse. Typically, a drop point represents the address of a UPS facility. Drop points are used in zone skipping. You use zone skipping when you instruct one carrier to deliver packages to a pre-assigned drop point and another carrier to pick them up and deliver them to their final destinations. Shipping charges are determined by the number of zones crossed; therefore, using zone skipping reduces delivery charges because less zones within the country are crossed. See Work with Ship Via Indicia Screen.

In this topic:

- Edit Warehouse Drop Point Screen (Enter Mode)
- Edit Warehouse Drop Point Screen (Change Mode)
- Edit Warehouse Drop Point Screen (Add Mode)
  - Enter SCF Range Pop-up Window
  - Copy Warehouse Drop Point Pop-up Window

Edit Warehouse Drop Point Screen (Enter Mode)

Purpose: This is the first screen used to change and copy warehouse drop points.

How to display this screen: Enter EWDP in the *Fast Path* field at the top of any menu.

Field	Description
Warehouse	A code that represents the warehouse. Validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS). *Numeric, 3 positions; required.*
Ship via	A code that represents the carrier of this shipment. Validated against the Ship Via table; see Working with Ship Via Codes (WVIA). *Numeric, 3 positions; required.*

Screen Option	Procedure
Copy a warehouse drop point	Enter the Warehouse and Ship via codes and select Copy to advance to the Copy Warehouse Drop Point Pop-up Window.

Edit Warehouse Drop Point Screen (Change Mode)

Purpose: Use this screen to change or create a drop point, and to enter the SCF range for a drop point.

How to display this screen: Complete the Edit Warehouse Drop Point Screen (Enter Mode).

Field	Description
Warehouse	The warehouse code and description which are carried over from the previous screen. *Alphanumeric, 3 positions; display-only.*
Ship via code	The ship via code and description which are carried over from the previous screen. *Alphanumeric, 2 positions; display-only.*
SCF	A code that represents the first 3 positions of a postal code. Validated against the SCF table; see Working with SCF Codes (WSCF). *Alphanumeric, 3 positions; required.*

Field	Description
States	The primary states or provinces associated with this SCF. The system displays this information based on the SCF selected. State codes are defined in and validated against the state table, which is accessible through the Work with Countries menu option; see Setting Up the Country Table (WCTY). *Alphanumeric, 2 positions; display-only.*
Transfer days	The number of days it takes to transfer the order from the warehouse to the drop point. This may be a centralized warehouse (in which you must ship from one warehouse to another) or a drop point (which is a place where another shipper picks up the package and delivers it to its final destination to save shipping charges). Used by the system to calculate when to print pick slips. *Numeric, 3 positions; required.*
Drop point	A code that represents the drop point. Validated against the Drop Point table; see Working with Drop Points (WDPT). *Numeric, 3 positions; required.*

Screen Option	Procedure
Create a warehouse drop point	Select Create to advance to the Edit Warehouse Drop Point Screen (Add Mode).
Delete a warehouse drop point	Select Delete for a drop point to delete it.
Define an SCF range	Select Create Range to advance to the Enter SCF Range Pop-up Window.

Edit Warehouse Drop Point Screen (Add Mode)

Purpose: Use this screen to create a warehouse drop point.

How to display this screen: Select Create at the Edit Warehouse Drop Point Screen (Change Mode).

Field	Description
Warehouse	The warehouse code and description which are carried over from the previous screen. *Alphanumeric, 3 positions; display-only.*
Ship via code	The ship via code and description which are carried over from the previous screen. *Alphanumeric, 2 positions; display-only.*
SCF	A code that represents the first 3 positions of the destination postal code. Validated against the SCF table; see Working with SCF Codes (WSCF). *Alphanumeric, 3 positions; display-only.*
States	Not implemented on this screen.

Field	Description
Transfer days	The number of days it takes to transfer the order from the warehouse to the drop point. This may be • a centralized warehouse (in which you must ship from one warehouse to another), or • a drop point (which is a place where another shipper picks up the package and delivers it to its final destination to save shipping charges). Used to determine when to print pick slips. *Numeric, 3 positions; required.*
Drop point	A code that represents the drop point. Validated against the Drop Point table; see Working with Drop Points (WDPT). *Numeric, 3 positions; required.*

Screen Option	Procedure
Enter an SCF range for a drop point	Select Create Range to advance to the Enter SCF Range Pop-up Window.
Change an SCF code	Select Change to return to the Edit Warehouse Drop Point Screen (Change Mode).

Enter SCF Range Pop-up Window

Purpose: Use this window to set up drop point information for a range of SCF codes.

How to display this window: Select Create Range at the Edit Warehouse Drop Point Screen (Add Mode) or at the Edit Warehouse Drop Point Screen (Change Mode).

Field	Description
Country	The country for which you are entering an SCF range.
SCF Range	The range of SCF numbers included in this drop point.
Transfer Days	The number of days it takes to transfer the order from the warehouse to the drop point. See Transfer days. *Numeric, 3 positions; required.*
Drop Point	A code that represents the drop point. Validated against the Drop Point table. *Numeric, 3 positions; required.*

Copy Warehouse Drop Point Pop-up Window

To copy a warehouse drop point: Enter the Warehouse and Ship Via codes, then select Create Range to display the Copy Warehouse Drop Point pop-up window.

Field	Description
Copy to warehouse	The new warehouse. The system will use the warehouse code entered at the Edit Warehouse Drop Point Screen (Add Mode) or (Change Mode) and copy it to the new warehouse. *Alphanumeric, 3 positions; required.*

Field	Description
Copy to ship via	The new ship via. The system will use the ship via code entered at the Edit Warehouse Drop Point Screen (Add Mode) or (Change Mode) and copy it to the new ship via. *Alphanumeric, 2 positions; required.*

Editing SCF Ship Via (ESSV)

Purpose: Editing SCF ship via is used to update SCF and drop point information all at once, rather than entering this information for each SCF or drop point.

Drop points represent locations to which merchandise will be shipped from your warehouse. Typically, a drop point represents the address of a UPS facility. Drop points are used in zone skipping. You use zone skipping when you instruct one carrier to deliver packages to a pre-assigned drop point and another carrier to pick them up and deliver them to their final destinations. Shipping charges are determined by the number of zones crossed; therefore, using zone skipping reduces delivery charges because less zones within the country are crossed. See Work with Ship Via Indicia Screen for more information on zone skipping.

In this topic:

- Edit SCF Ship Via Screen (Enter Mode)
- Edit SCF Ship Via Screen (Change Mode)
- Edit SCF Ship Via Screen (Add Mode)
- Copy SCF Ship Via Pop-up Window

Edit SCF Ship Via Screen (Enter Mode)

Purpose: Use this screen to change and copy SCF ship via information.

How to display this screen: Enter ESSV in the *Fast Path* field at the top of any menu.

Field	Description
Drop point	A code that represents the drop point; see Working with Drop Points (WDPT). *Numeric, 3 positions; required.*
Ship via	A code that represents a carrier for this shipment. Validated against the Ship Via table; see Working with Ship Via Codes (WVIA). *Numeric, 3 positions; required.*

Screen Option	Procedure
Copy a ship via	Enter the Drop Point and Ship via codes and select Copy to advance to the Copy SCF Ship Via Pop-up Window.

Edit SCF Ship Via Screen (Change Mode)

Purpose: Use this screen to edit SCF ship via information.

How to display this screen: Enter a drop point and ship via code at the Edit SCF Ship Via Screen (Enter Mode), or select Create at the Edit SCF Ship Via Screen (Add Mode).

Field	Description
Drop point	The drop point code and description which are carried over from the previous screen. *Alphanumeric, 3 positions; display-only.*
Ship via code	The ship via code and description which are carried over from the previous screen. *Alphanumeric, 2 positions; display-only.*
Country	The country where the SCF is located. Validated against the Country table; see Setting Up the Country Table (WCTY). *Alphanumeric, 3 positions; optional.*
SCF	A code that represents the first 3 positions of a postal code. Validated against the SCF table; see Working with SCF Codes (WSCF). *Alphanumeric, 3 positions; required.*
States	The primary states or provinces associated with this SCF. The system displays this information based on the SCF selected. There can be up to five states associated with an SCF. State codes are defined in and validated against the state table, which is accessible through the Work with Countries menu option; see Setting Up the Country Table (WCTY). *Alphanumeric, 2 positions; display-only.*
Zone	The zone within the country to which the carton is being shipped in relation to the drop point. Zones are geographical sections of the country that are defined by UPS. See About Zones. *Numeric, 2 positions; required.*
Lead days	The number of days it takes the shipper to deliver merchandise to this SCF. **Calculation for pick slip generation:** The system uses this number in conjunction with your internal lead days to determine when to generate pick slips for an order. The calculation is: `Arrival date - Shipping lead days < or = Today's date.` The system does not exclude weekends/holidays in its calculation. **Calculation for Alternate Shipping Charges by Via window:** The system also uses this setting to calculate the Ship lead days and Expected delivery date to display at the Alternate Shipping Charges by Via Window in order entry, and this window uses a different calculation than the one described above. See the description of the Alternate Shipping Charges by Via Window for more information. *Numeric, 3 positions; required.*

Screen Option	Procedure
Create an SCF ship via	Select Create to advance to the Edit SCF Ship Via Screen (Add Mode).
Delete an SCF ship via	Select Delete for an SCF ship via to delete it.

Edit SCF Ship Via Screen (Add Mode)

Purpose: Use this screen to enter new SCF/ship via information. When you select OK, your entries are created and disappear from the screen.

To create an SCF ship via: At the Edit SCF Ship Via Screen (Change Mode), select Create.

Field	Description
Drop point	The drop point code and description, which are carried over from the previous screen. *Alphanumeric, 3 positions; display-only.*
Ship via code	The ship via code and description, which are carried over from the previous screen. *Alphanumeric, 2 positions; display-only.*
Country	The country where the SCF is located. Validated against the Country table; see Setting Up the Country Table (WCTY). *Alphanumeric, 3 positions; required.*
SCF	A code that represents the first 3 positions of a postal code. Validated against the SCF table; see Working with SCF Codes (WSCF). *Alphanumeric, 3 positions; required.*
States	These fields are not implemented on the screen in ADD mode.
Zone	The zone within the country to which the carton is being shipped in relation to the drop point. Zones are geographical sections of the country that are defined by UPS. See About Zones. *Numeric, 2 positions; required.*
Lead days	The number of days it takes the shipper to deliver merchandise to this SCF. **Calculation for pick slip generation:** The system uses this number in conjunction with your internal lead days to determine when to generate pick slips for an order. The calculation is: `Arrival date - Shipping lead days < or = Today's date.` The system does not exclude weekends/holidays in its calculation. **Calculation for Alternate Shipping Charges by Via window:** The system also uses this setting to calculate the Ship lead days and Expected delivery date to display at the Alternate Shipping Charges by Via Window in order entry, and this window uses a different calculation than the one described above. See the description of the Alternate Shipping Charges by Via Window for more information. *Numeric, 3 positions; required.*

Screen Option	Procedure
Change an SCF ship via	Select Change to display the Edit SCF Ship Via Screen (Change Mode). At this screen you can change any information except the Drop Point and Ship Via codes.

Copy SCF Ship Via Pop-up Window

To copy an SCF ship via: At the Edit SCF Ship Via Screen (Enter Mode), enter the Drop Point and Ship Via codes, then select Copy.

Field	Description
Copy to drop point	The new drop point. The system will use the drop point code entered at the Edit SCF Ship Via Screen (Add Mode) or (Change Mode) and copy it to the new drop point. *Alphanumeric, 3 positions; required.*
Copy to ship via	The new ship via. The system will use the ship via code entered at the Edit SCF Ship Via Screen (Add Mode) or (Change Mode) and copy it to the new ship via. *Alphanumeric, 2 positions; required.*

Working with Dunnage Weight (WDUN)

Dunnage weight is the weight of packing materials. Use the Work with Dunnage Weight menu option to define the weight of dunnage based on the cube of the items on a pick slip.

As pick slips are created during pick slip generation, the cube of the pick is used to determine the extra weight to be added to the pick slip for the packing materials. The extra weight is added to the weight of the pick and the total weight is rounded up to the next pound. This total weight is included in the calculation for best way shipping; see Working with Shipping Rates (WSHR).

In this topic:

- Work with Dunnage Weight Screen
- Create Dunnage Weight Pop-up Window

Work with Dunnage Weight Screen

How to display this screen: Enter WDUN in the *Fast Path* field at the top of any menu or select Work with Dunnage Weight from a menu.

Field	Description
Ship via	A code that represents the shipper; see Working with Ship Via Codes (WVIA). *Numeric, 2 positions; optional.*
Carton cube	A code that represents the total cubic volume of the carton. *Numeric, 10 positions; optional.*
Dunnage weight	The amount of weight to add to the total carton weight when calculating the total shipping weight. *Numeric, 13 positions with a 3-place decimal; display-only.*

Screen Option	Procedure
Create a dunnage weight	Select Create to advance to the display the Create Dunnage Weight Pop-up Window.
Change a dunnage weight	Select Change for a dunnage weight to display the Change Dunnage Weight window. At this window, you can change only the weight itself. See Create Dunnage Weight Pop-up Window for field descriptions.

Screen Option	Procedure
Delete a dunnage weight	Select Delete for a dunnage weight to delete it. **Note:** The dunnage weight is deleted immediately; the system does not display a confirmation pop-up window.

Create Dunnage Weight Pop-up Window

To create a dunnage weight: At the Work with Dunnage Weight Screen, select Create.

Field	Description
Ship via	The ship via code for this carrier. Ship via codes are defined in and validated against the Ship Via table. See Working with Ship Via Codes (WVIA). *Numeric, 2 positions.* *Create window: required.* *Change window: display-only.*
Maximum cube	The maximum cubic value for a carton. You cannot create more than one dunnage weight for the same ship via/cube number combination. *Numeric, 10 positions.* *Create window: required.* *Change window: display-only.*
Dunnage weight	The weight of the packing materials. This weight is added to the total weight of the pick slip in pick generation before before evaluating pick slips for best way shipping. Leave this field blank to indicate that the dunnage weight is zero. *Numeric, 13 positions with a 3-place decimal; optional.*

Working with Zip/Ship Via (WZSV)

Purpose: Use the Zip/Ship Via table to cross-reference default shippers for specific destinations, based on postal code. You can also use this option to indicate that a best way shipping surcharge applies to the ship via.

Ship via override: When you accept an order in order entry, the system checks the Zip/Ship Via table for a default shipper if the shipper specified on the order allows auto-assignment of carrier (the ship via's*Allow auto assignment* = Selected). If auto-assignment is allowed and there is a default ship via defined for the postal code, the system substitutes the original ship via with the default ship via automatically.

> **Note:**
>
> The shipper substitution occurs only if:

- you are using the Order/Recap screen, as defined by the Display Order Recap (A75) system control value, and
- the Allow auto assignment field for the ship via currently on the order is selected.
- another ship via override does not take precedence; see Ship Via Override Hierarchy for a list of ways the system can override the shipper specified on the order with another shipper and the hierarchy in which the ship via overrides take precedence.

In this topic:

- Work with Zip Ship Via Screen
  - Create Zip/Ship Via Screen

Work with Zip Ship Via Screen

How to display this screen: Enter WZSV in the *Fast path* field at the top of any menu or select the Work with Zip/Ship Via option from a menu.

Field	Description
Zip code	A code for a geographical delivery area, as defined by the United States Postal Service or other federal office. See Setting Up the Zip/City/State (Postal Code) Table (WZIP). *Alphanumeric, 5 positions; optional.*
Ship via	The code for the carrier that will deliver the package to the customer. Ship via codes are defined in and validated against the Ship Via table. See Working with Ship Via Codes (WVIA). *Numeric, 2 positions; optional.*
Status	A code that controls if (and how) this shipper can be used to deliver packages to the postal code. Valid values are: • Allow = The shipper is allowed to ship to this postal code. • Exclude = The shipper cannot ship to this postal code. • Default = This ship via will be substituted automatically when you accept a new order if the ship via on the order is set up to allow automatic assignment of carrier and another ship via override does not take precedence. • Surcharge = A surcharge applies to deliveries in this postal code by this shipper for the purposes of calculating best way shipping at pick slip generation. You define the amount of the surcharge in the Ship Via table. *This setting is not currently implemented.* *Optional.*

Screen Option	Procedure
Create a zip/ship via	Select Create to advance to the Create Zip/Ship Via Screen.

Screen Option	Procedure
Change a zip/ship via	Select Change for a zip/ship via to advance to the Change Zip/ Ship Via screen. At this screen, you can change only the *Status* field. See Create Zip/Ship Via Screen for field descriptions.
Delete a zip/ship via	Select Delete for a zip/ship via to delete it.
Display a zip/ship via	Select Display for a zip/ship via to advance to the Display Zip/ Ship Via screen. You cannot change any information on this screen. See Create Zip/Ship Via Screen for field descriptions.

Create Zip/Ship Via Screen

Purpose: Use this screen to create a zip/ship via combination.

How to display this screen: At the Work with Zip Ship Via Screen, select Create.

Field	Description
Zip code	A code for a geographical delivery area, as defined by the United States Postal Service or other federal office. Zip, or postal, codes are defined in and validated against the Zip/ City/State table. See Setting Up the Zip/City/State (Postal Code) Table (WZIP). *Alphanumeric, 5 positions.* *Create screen: required.* *Change screen: display-only.*
Ship via	The code for the carrier that will deliver the package to the customer. Ship via codes are defined in and validated against the Ship Via table. See Working with Ship Via Codes (WVIA). *Numeric, 2 positions.* *Create screen: required.* *Change screen: display-only.*

Field	Description
Status	A code that controls if (and how) this shipper can be used to deliver packages to the postal code. Valid values are: • Allow = The shipper is allowed to ship to this postal code. • Exclude = The shipper cannot ship to this postal code. The system issues a message similar to the following during Order Entry if you use a shipper that is excluded from shipping to the destination postal code: `Ship via (3) is not valid with ship to zip code (017).` • Default = This ship via will be substituted automatically when you accept the new order; this substitution occurs only if: – you are using the Order/Recap screen, as defined by the Display Order Recap (A75) system control value, *and* – the Allow auto assignment field for the ship via currently on the order is selected, *and* – another ship via override does not take precedence; see Ship Via Override Hierarchy • Surcharge = A surcharge applies to deliveries in this postal code by this shipper for the purposes of calculating best way shipping at pick slip generation, in which the system selects the least expensive ship via for a pick slip. You define the amount of the surcharge through Working with Shipping Rates (WSHR). This surcharge is not considered as part of best way shipping evaluation in order entry; see Working with Best Way Ship Vias. *This setting is not currently implemented.* *Required.*

Working with Tax Jurisdiction (WTXJ)

Tax Jurisdictions define postal code ranges for an area where a special tax structure exists. For example, tax jurisdictions exist for some counties in New York and New Jersey. Standard tax reporting does not identify taxes collected at the jurisdiction level.

Taxes are calculated from tax rates set up for an SCF, postal code, or for the country itself. The system calculates tax differently depending on whether you use VAT and tax-inclusive pricing, as controlled by the Tax Included in Price (E70) system control values.

Alternatively, you can use an external tax system to calculate sales tax on your orders and to maintain the tax rates appropriately. See Vertex Interface and Avalara AvaTax Interface.

> **Note:**
>
> You can use this menu option to define tax jurisdictions within the United States only.

Tax jurisdiction report: The Tax Jurisdiction Report identifies the dollars collected and dollars credited for each tax jurisdiction for a specified invoice date range; see Printing the Tax Jurisdiction Report (PTXJ) for more information on this report.

In this topic:

Work with Tax Jurisdiction Screen

How to display this screen: Enter WTXJ in the *Fast path* field at the top of any menu or select Work with Tax Jurisdiction from a menu.

Field	Description
Tax jurisdiction	The area for which a special tax structure exists. *Alphanumeric, 10 positions; optional.*
Description	The description associated with the tax jurisdiction. *Alphanumeric, 30 positions; optional.*
From postal code	The lowest postal code in the range of postal codes for this tax jurisdiction. A special tax structure exists for the entire area included in this range of postal codes. *Alphanumeric, 10 positions; optional.*
To postal code	The highest postal code in the range of postal codes for this tax jurisdiction. A special tax structure exists for the entire area included in this range of postal codes. *Alphanumeric, 10 positions; optional.*

Screen Option	Procedure
Create a tax jurisdiction	Select Create to advance to the Create Tax Jurisdiction Screen.
Change a tax jurisdiction	Select Change for a jurisdiction to advance to the Change Tax Jurisdiction screen. At the Change screen you can change the *Description* field. See Create Tax Jurisdiction Screen for field descriptions.
Delete a tax jurisdiction	Select Delete for a jurisdiction to delete it. If there has been any order activity within the tax jurisdiction area, a message similar to the following displays: `WARNING - DEPENDENT RECORDS EXIST` The message tells you that history exists for the tax jurisdiction in the Tax Jurisdiction History table, including information on the amount of tax charged and credited. You will lose this history if you delete the jurisdiction.
Display a tax jurisdiction	Select Display for a jurisdiction to advance to the Display Tax Jurisdiction screen. You cannot change any information on this screen. See Create Tax Jurisdiction Screen for field descriptions.

Create Tax Jurisdiction Screen

Purpose: Use this screen to create a tax jurisdiction.

How to display this screen: At the Work with Tax Jurisdiction Screen, select Create.

Field	Description
Tax jurisdiction	The area for which a special tax structure exists. *Alphanumeric, 10 positions.* *Create screen: required.* *Change screen: display-only.*
Description	The description associated with the tax jurisdiction. *Alphanumeric, 30 positions; required.*
From postal code	The lowest postal code in the range of postal codes for this tax jurisdiction. A special tax structure exists for the entire area included in this range of postal codes. Your entry is validated against the SCF table. An SCF is a geographic location identified by the first 3 characters of the postal code. In the SCF table, you define the states or provinces included in the SCF and specify the associated tax and freight structure. **Note:** The system does not allow you to set up tax jurisdictions with overlapping postal codes. *Alphanumeric, 10 positions.* *Create screen: required.* *Change screen: display-only.*
To postal code	The highest postal code in the range of postal codes for this tax jurisdiction. A special tax structure exists for the entire area included in this range of postal codes. Your entry is validated against the SCF table. An SCF is a geographic location identified by the first 3 characters of the postal code. In the SCF table, you define the states or provinces included in the SCF and specify the associated tax and freight structure. *Alphanumeric, 10 positions.* *Create screen: required.* *Change screen: display-only.*

Working with Weight Tables for Order Weight (WFTB)

Purpose: Use Work with Freight Tables to create and maintain freight tables for use with the order weight freight method, defined in the Source Code table.

Freight by order weight involves calculating the freight charges for an order by evaluating the number of cartons you expect the order will require to ship, and the weight of each carton. The tables you create with this function define the freight charges to add to an order based on the weight of each carton.

When calculated: In order entry, the system calculates freight by order weight during repricing, the initial and final order accept, and when you select to change the last line on the order if you do not change its order quantity. The *Freight* field on the order does not include order weight freight charges as you add lines to the order; however, the system does display ship via service charges and ship via weight charges immediately. When the system calculates freight by order weight, the system updates the *Freight* field for the order with the complete freight amount.

In order maintenance, the system calculates freight by order weight as you add or change each line on the order. The *Freight* field on the order includes all freight charges as changes to freight are made to the order.

Setup: In order to use this freight method, you must set up information correctly in several additional tables. See Freight by Order Weight Setup for instructions on setting up the order weight freight method.

Logic and examples: See Freight by Order Weight Calculation Logic and Examples for the logic that the system uses to calculate freight by order weight.

Removing additional charges: During Order Entry, if you remove additional charges from the order when using the freight by order weight freight method, the system adds the additional charges back to the order when it calls repricing during the final order accept.

In this topic:

- Freight by Order Weight Calculation Logic and Examples
- Freight by Order Weight Setup
- Work with Freight Table Header Screen
  - Create Freight Table Screen
- Work with Freight Table Details Screen
  - Create Freight Table Details Screen
- Copy Freight Table Details Screen

Freight by Order Weight Calculation Logic and Examples

Calculation: The system uses the following steps in calculating freight by order weight:

During order entry, the system calculates freight by order weight during repricing, the initial and final order accept, and when you change the last line on the order if you do not change its order quantity. The system adds together the weight of all non-ship alone items that have the same shipper and arrival date. The system calculates freight on ship-alone items separately (as defined by the field in the Item table).

Order lines for a negative quantity: The system does not include order lines with a negative quantity in the freight by order weight calculation.

Freight by Order Weight in Order Maintenance: During Order Maintenance, the system calculates freight by order weight each time you add or change an item on the order.

Example: An order includes the following non-ship alone items with the same ship via and arrival date:

Item	Weight	Quantity	Total Weight
1234	10 lbs.	1	10 lbs.
5678	20 lbs.	2	40 lbs.
9123	30 lbs.	1	30 lbs.
		Total	80 lbs.

The system determines how many pounds to allocate to each carton, based on the Maximum carton weight defined for the ship via on the order and the value defined in the Extra Weight for Order Weight Freight Method (D85) system control value.

Example:

Maximum carton weight = 30 lbs.

Extra carton weight = 1 lb.

Pounds to allocate per carton = 29 lbs. (30 - 1)

The system then determines how many cartons the items would require to ship.

> **Note:**
>
> The actual number of cartons you use to ship these items may differ; these calculations are used for assigning a freight amount to the order only.

Example: 80 lbs. (step 1) divided by 29 lbs. (step 2) = 2 full cartons with a remainder of 22 lbs. in a partial carton

The system then consults the freight table for each full carton, and the final, partial carton, adding the freight amount from the table defined for that weight to the order for each carton. The system includes the extra weight defined in the Extra Weight for Order Weight Freight Method (D85) system control value in each carton weight.

> **Note:**
>
> In order to assign a freight amount to the order, the system must find a record on the freight table with the correct ship via, business/residence flag, shipping zone and weight. See Freight by Order Weight Setup.

Example: The freight table contains the following matching records:

Weight	Freight Amount
10 lbs.	$5.00
15 lbs.	$6.00
20 lbs.	$7.00
25 lbs.	$8.00
30 lbs.	$9.00

The system adds the following freight amounts to the order:

Carton	Calculation	Result
first carton (30 lbs.)	=	$9.00
second carton (30 lbs.)	=	$9.00
third carton (22 + 1 lbs.)	=	$8.00
Total freight	=	$26.00

> **Note:**
>
> The freight table is an "up to" table, meaning that the system selects the lowest freight amount from the table that is greater than or equal to the order weight.

The system repeats the above steps for each different ship via/arrival date combination on the order.

Ship-alone items: The system consults the freight table separately for each ship-alone item on the order.

Example: The order in the above example included the following ship-alone items

Item	Quantity	Weight
ABCD	2	10 lbs.

The system consults the freight table separately for each item as follows:

10 lbs. + 1 lb. carton weight from the System Control table = 11 lbs. per carton

The system adds an additional $6.00 to the order for each carton.

Include Weight of all Items in Freight by Order Weight: If the Include Weight of all Items in Freight by Order Weight (G05) system control value is selected, the system adds together the weight of all non-ship alone items and ship alone items, regardless of the item's shipper or arrival date. This way the system consults the freight table once for all of the items on the order.

Calculate Freight by Order Weight for N/C Orders: If the Calculate Freight by Order Weight for N/C Orders (G68) system control value is selected, the system calculates freight by order weight for an order whose merchandise total is zero. You might wish to calculate freight for an order whose merchandise total is zero if the order includes a warranty item.

Excluding an item from the freight calculation: You can set up an item to be excluded from the total weight for freight calculation purposes by creating an exemption through Working with Freight Exempt Items (WFEI). Additionally, you must have the Use Item Freight Exemption File (E73) system control value selected. See Freight by Order Weight Setup for more information on required setup.

Freight by Order Weight Setup

Purpose: A freight table used to calculate freight for a given source code must contain a record for every combination of shipper, business or residence flag, geographical zone and weight possible for orders using that source code. If the system does not find a matching record on the freight table, freight by order weight will not be added to the order. Instructions for setting up freight tables are provided later in this topic. In addition, you must set up the following fields:

Table	Field Name	Valid Value
Working with Source Codes (WSRC)	Freight method	**Order Weight**
	Freight table	code representing the freight table defined through Work with Freight Tables

Table	Field Name	Valid Value
	Price method	**Regular Plus Reprice**
Working with Ship Via Codes (WVIA)	Maximum carton weight	weight for the system to use when calculating how many items can fit in each carton
Performing Initial Item Entry (MITM)	Sell wgt. (Selling weight)	weight of the item
	Ship alone	blank (' ') for non-ship alone items or **Ship Alone**
System Control (WSYS)	Extra Weight for Order Weight Freight Method (D85)	extra weight to subtract from each carton's capacity when calculating how many items can fit in the carton, and to add to the order weight for each carton

Table	Field Name	Valid Value
	Include Weight of all Items in Freight by Order Weight (G05)	selected, if you wish the system to add together the weight of all non-ship alone items and ship alone items, regardless of the item's shipper or arrival date

Note: Set this value to unselected if you are using

Table	Field Name	Valid Value
		an item freight exemption; see below.
	Calculate Freight by Order Weight for N/C Orders (G68)	selected, if you wish the system to calculate freight by order weight for orders whose merchandise total is zero Set this value to unselected if you are using an item freight exemption; see below.
	Default Warehouse (A04)	a warehouse code
Creating and Maintaining Warehouses (WWHS) Working with SCF/Ship Via Values (WSHV)	Drop point	both drop points must be the same

Additional required setup to have item freight exemptions in freight by order weight calculation:

- Use Item Freight Exemption File (E73) system control value must be selected

- Include Weight of all Items in Freight by Order Weight (G05) must be unselected
- Calculate Freight by Order Weight for N/C Orders (G68) must be unselected

Troubleshooting: Any of the following conditions will cause the system to fail to calculate freight by order weight correctly:

- no Sell wgt. (Selling weight) defined for an item
- no Maximum carton weight defined for the ship via
- an order dollar total of zero if the Calculate Freight by Order Weight for N/C Orders (G68) system control value is unselected
- a carton weight defined for the Ship Via that exceeds the highest related freight table record
- *Additional freight only* selected for the Ship Via
- *Ship via* on the order header not found on the freight table
- *Delivery code* on the order header not found on the freight table
- *Shipping zone* for the SCF/Ship Via on the order not the same as the *Shipping zone* on the freight table
- the customer has a loyalty membership that provides free freight

> **Note:**
>
> If you use the Best Way Ship Via for Auto-Assignment (J67) and there are no freight table records for the "dummy" ship via, there will not be any freight charges on the order until the system overrides the ship via on the order to the actual ship via with the lowest shipping charges.

Work with Freight Table Header Screen

Purpose: Use this screen to review existing freight table headers, to create, change, copy or delete a freight table, or to advance to the Work with Freight Table Detail screen.

How to display this screen: Enter WFTB in the *Fast path* field at the top of a menu, or select Work with Freight Tables from a menu.

Field	Description
Freight table	The code defining a freight table to use for order weight freight. *Alphanumeric, 3 positions; optional.*
Description	The description associated with the freight table. *Alphanumeric, 30 positions; optional.*

Screen Option	Procedure
Create a new freight table	Select Create to advance to the Create Freight Table Screen.
Change a freight table	Select Change for a freight table to advance to the Change Freight Table screen. See Create Freight Table Screen for field descriptions. At the Change screen you can change only the *Description* field.

Screen Option	Procedure
Copy freight table details	Select Copy for a freight table to advance to the Copy Freight Table Details Screen.
Delete a freight table	Select Delete for a freight table to delete it.
Work with freight table details	Select Work with Details for a freight table to advance to the Work with Freight Table Details Screen.

Create Freight Table Screen

Purpose: Use this screen to create a new freight table header. The header consists of the freight table code and description; in order to use the freight table, you must create both the header and detail. See Work with Freight Table Details Screen.

How to display this screen: Select Create at the Work with Freight Table Header Screen.

Field	Description
Freight table	The code defining a freight table for use with the order weight freight method. You enter this code in the Source code field of the Source Code table for any source code to use this freight table. *Alphanumeric, 3 positions.* *Create screen: required.* *Change screen: display-only.*
Description	The description associated with the freight table. *Alphanumeric, 30 positions; required.*

Completing this screen: You advance to the Work with Freight Table Details Screen, where you can create freight table detail. You return to the Create Freight Table screen.

Work with Freight Table Details Screen

Purpose: Use this screen to create, change, delete or display freight table detail associated with the freight table header. The system consults this table when you enter an order whose source code points to this freight table.

How to display this screen: Select Work with Details for a freight table at the Work with Freight Table Header Screen. You also advance to this screen when you select OK to accept a new freight table header at the Create Freight Table Screen.

Field	Description
Freight table	A code representing the freight table. *Alphanumeric, 3 positions; display-only.*
Ship via	A code representing the shipper to deliver merchandise to your customers. Validated against the Ship Via table. *Numeric, 2 positions; optional.*

Field	Description
Del cde (Delivery code)	A code representing the type of delivery address on an order. Valid values are: • Business • Residential • **No Distinction** *Optional.*
Zone	The geographical region where the shipper delivers packages. UPS uses zones to calculate rates. *Numeric, 3 positions; optional.*
Weight	The maximum amount that a carton can weigh for the dollar amount defined for the freight table to apply. This is an "up to" field; the system selects the lowest freight table record whose weight is equal to or greater than the carton weight. *Numeric, 13 positions with a 3-place decimal; optional.*
Rate	The dollar amount to charge for a carton whose weight matches this freight table record. *Numeric, 13 positions with a 2-place decimal; optional.*

Screen Option	Procedure
Create a freight table record	Select Create to advance to the Create Freight Table Details Screen.
Change a freight table record	Select Change for a record to advance to the Change Freight Table Details screen. See Create Freight Table Details Screen for field descriptions. At the Change screen you can change the *Rate* field. To change any other information, you must delete the record and create a new one.
Delete a freight table record	Select Delete for a record to delete it.
Display a freight table record	Select Display for a record to advance to the Display Freight Table Details screen. You cannot change any information on this screen. See Create Freight Table Details Screen for field descriptions.

Create Freight Table Details Screen

Purpose: Use this screen to create freight table details.

How to display this screen: At the Work with Freight Table Details Screen, select Create. See Freight by Order Weight Setup for more information on setting up a freight table.

Field	Description
Freight table	The code representing a table that the system consults to calculate freight on orders using the order weight freight method. *Alphanumeric, 3 positions; display-only.*

Field	Description
Ship via	The code representing a shipper who delivers merchandise to your customers. Validated against the Ship Via table; see Working with Ship Via Codes (WVIA). *Numeric, 2 positions.* *Create screen: required.* *Change screen: display-only.*
Delivery code	A code representing the type of delivery address on an order. Valid values are: • **Business** • Residential • No Distinction Some shippers, such as UPS, charge different rates based on the type of delivery address. Only Business and Residential are valid delivery codes for a UPS ship via; see Working with Ship Via Codes (WVIA). *Create screen: optional.* *Change screen: display-only.*
Zone	The geographical region where the shipper delivers packages. UPS uses relative geographic zones, defined by SCF, to calculate shipping rates. See About Zones. *Numeric, 3 positions.* *Create screen: required.* *Change screen: display-only.*
Weight	The maximum amount that a carton can weigh for the dollar amount defined for this freight table record to apply. This is an “up to” field; the system selects the first freight table record whose weight is equal to or greater than the carton weight. Example: If you have records in your freight table for 10, 20 and 30 pounds, a carton weighing 11 pounds will match the 20-pound record. *Numeric, 13 positions with a 3-place decimal.* *Create screen: required.* *Change screen: display-only.*
Rate	The amount to charge for shipping a carton that matches the freight table record. *Numeric, 13 positions with a 2-place decimal; required.*

> **Note:**
>
> In order to match the freight table record, the order must have the same Ship via and Delivery code as the freight table record. In addition, the Shipping zone defined for the SCF/Ship Via on the order must match the Zone defined for the freight table record, and the carton weight must be less than or equal to the Weight defined for the freight table record. See Freight by Order Weight Setup.

Copy Freight Table Details Screen

Purpose: Use this screen to copy freight table detail records from an existing freight table to another freight table header.

How to display this screen: Select Copy for an existing freight table at the Work with Freight Table Header Screen.

How to use this screen: Enter an existing freight table code in the *To freight table* field. If the freight table you select as the destination for copying already has detail records, the following message displays:

```
Freight Table Details already exist for To Freight Table
```

If you enter a valid freight table code without existing detail records as your destination table, the *Confirm* prompt field displays. Select this field to copy the detail records to the destination freight table, or select OK to cancel the copy.

Working with Offer Ship Via Assignment (WSVA)

Purpose: Use the Offer Ship Via table to define ship via overrides for qualifying orders based on offer or source code, dollar total, and, optionally, SCF.

If an order, or any shipping address on an order, qualifies for a ship via override based on the information you define in this table, the system will change the ship via when you select Accept or Accept/Add Recip. to accept the order. If you use the Order Recap screen, the new ship via code will appear there; otherwise, the ship via override will be transparent to the operator.

You use the Dollar Method Used to Evaluate Offer Ship Via Override (E50) system control value to specify whether the system uses the order or merchandise total to determine whether an order qualifies for ship via override.

In this topic:

- Ship Via Override Logic
- Work with Offer Ship Via Screen
  - Create Offer Ship Via Screen (Creating a Ship Via Override)
- Copy Offer Ship Via Screen

Ship Via Override Logic

The system uses the following guidelines in determining when and how to override the ship via on an order based on the Offer Ship Via table.

When does the override take place? The system evaluates each shipping address on an order for ship via override only once: when you select Accept or Accept/Add Recip. to accept the order or shipping address. If you make additional changes to the order in either Order Entry or Order Maintenance, the system will not reevaluate the order.

What items count toward the total? The system does not evaluate an order for ship via override unless there is at least one reserved item on the order. However, the system does include item prices from held and backordered lines in the qualifying order totals for ship via override.

How does the system calculate the qualifying total? The system checks the Dollar Method Used to Evaluate Offer Ship Via Override (E50) field in the System Control table. If you set this field to MERCH, the system compares the merchandise total, including any discounts, on the order with the dollar amount specified for the ship via override. If you set this field to ORDER TOTL, the system compares the order total, including the net of all positive or negative charges. If you leave this field blank, the system does not evaluate the order for the ship via override.

What if you override the source code on an order line? The system uses the source code on the order header to determine whether an order is eligible for a ship via override. If you override the source code or offer on an individual order line, the system does not consider this information when evaluating the order for ship via override; additionally, the dollar total for that line still counts toward the qualifying order dollar total. Similarly, if you specify a ship via for an item by entering the ship via in the Item table, the system still counts that item price toward the qualifying total for ship via override. The header-level ship via override would still occur, even if this item is the only item on the order.

What if the order qualifies for more than one offer/source code override? If the order qualifies for a ship via override based on both offer and source code, the system selects the override based on source code. If the order qualifies for more than one ship via override within source code or offer, the system selects the override with the highest dollar total for which the order qualifies. For example, an order meets the criteria for the following ship via overrides:

Offer or Source?	Dollar Total
offer	200.00
source	100.00
source	150.00

The system uses the ship via associated with the third override presented above.

What if the operator overrides the ship via on the order? The ship via on the order header must be the same one specified in the Default Ship Via (A77) field in the System Control table for the system to evaluate the order for ship via override. This means that if you change the default ship via on the Default Values for Orders screen or at the order header, the system does not evaluate the order for an offer ship via override. The same logic holds true if there is no Default Ship Via (A77) specified in the System Control table; if the ship via on the order header does not match the system control value (that is, it is not blank), the system does not evaluate the order for ship via override. The rule of thumb is this: the system compares the ship via on the order header with the ship via in the Default Ship Via (A77) field to determine whether to override, regardless of how the ship via came to be on the order header.

Are there other ship via overrides that might apply to the order? There are several other ways you can apply a ship via override to an order. See Ship Via Override Hierarchy for a table listing ship via overrides and the hierarchy in which the overrides apply.

Ship via override examples: If you want to offer an automatic upgrade to overnight delivery for a source code, you could set up an override for the source code with a dollar total of $.01. If you want to offer free or reduced-price Federal Express delivery for orders over a certain dollar total, you would create an additional ship via, identical to your regular Federal Express ship via but with different freight charge information. As with any ship via, you must be sure that you have created the ship via/SCF combination in the SCF Ship Via table, or order entry displays an error message.

For more information:

- Default Ship Via (A77)*or* Dollar Method Used to Evaluate Offer Ship Via Override (E50) system control values

-
- ship via codes: Working with Ship Via Codes (WVIA)
- entering orders: Order Entry Entering Orders
- setting up a default ship via for an item: Performing Initial Item Entry (MITM)
- working with zip/ship via: Working with Zip/Ship Via (WZSV)
- working with default ship via by SCF: Working with SCF Codes (WSCF)
- setting up SCF/ship via combinations: Working with SCF/Ship Via Values (WSHV) and Editing SCF Ship Via (ESSV).

Work with Offer Ship Via Screen

How to display this screen: Enter WSVA in the *Fast path* field at the top of any menu or select Work with Offer Ship Via Assignment from a menu.

Field	Description
Ofr	The offer associated with a ship via override. Orders whose source codes point to this offer are eligible for the override if they also have a qualifying dollar amount. See Working with Offers (WOFR). *Alphanumeric, 3 positions; optional.*
Source	The source code associated with a ship via override. Orders with this source code are eligible for the override if they also have a qualifying dollar amount. See Working with Source Codes (WSRC). *Alphanumeric, 9 positions; optional.*
Order total	The order total required to be eligible for the ship via override. The system checks the Dollar Method Used to Evaluate Offer Ship Via Override (E50) field in the System Control table to determine whether to use the merchandise total or order dollar total, including all other charges. *Numeric, 13 positions with a 2-place decimal; optional.*
From SCF	The lowest SCF in the range of SCFs to qualify for the ship via override. See Working with SCF Codes (WSCF). *Alphanumeric, 3 positions; optional.*
To SCF	The highest SCF in the range of SCFs to qualify for the ship via override. *Alphanumeric, 3 positions; optional.*
Via (Ship via)	The code representing a shipper who delivers merchandise to your customers. An order that meets the criteria defined for the override is eligible to have its shipper changed to this ship via. See Working with Ship Via Codes (WVIA). *Numeric, 2 positions; optional.*

Screen Option	Procedure
Create a ship via override	Select Create to advance to the Create Offer Ship Via Screen (Creating a Ship Via Override).

Screen Option	Procedure
Change a ship via override	Select Change for a ship via override to advance to the Change Offer Ship Via screen. You can change any of the fields at this screen. See Create Offer Ship Via Screen (Creating a Ship Via Override) for field descriptions.
Delete a ship via override	Select Delete for a ship via override to delete it.
Display a ship via override	Select Display for a ship via override to advance to the Display Offer Ship Via screen. You cannot change any information on this screen. See Create Offer Ship Via Screen (Creating a Ship Via Override) for field descriptions.
Copy a ship via override information for an offer or source	Select Copy to advance to the Copy Offer Ship Via Screen.

Create Offer Ship Via Screen (Creating a Ship Via Override)

Purpose: Use this screen to create a ship via override.

How to display this screen: At the Work with Offer Ship Via Screen, select Create.

Field	Description
Offer	The offer associated with the ship via override. Orders whose header-level source codes point to this offer will be eligible for the override. If the order would be eligible for both a source code-related and an offer-related override, the system uses the source code-related override record. You must specify either an offer or a source code for the override, but not both. Offer codes are defined in and validated against the Offer table; see Working with Offers (WOFR). *Alphanumeric, 3 positions; required if you do not enter a source code.*
Source	The source code associated with the ship via override. Orders with this source code at the header will be eligible for the override. If the order would be eligible for both a source code-related and an offer-related override, the system uses the source code-related override record. You must specify either an offer or a source code for the override, but not both. Source codes are defined in and validated against the Source Code table; see Working with Source Codes (WSRC). *Alphanumeric, 9 positions; required if you do not enter an offer code.*

Field	Description
Total	The dollar total of the order required to be eligible for the override. The system checks the Dollar Method Used to Evaluate Offer Ship Via Override (E50) field in the System Control table to determine whether to use the merchandise total or order dollar total, including all other charges. If an order would be eligible for more than one override for a source code or offer, the system uses the override with the highest dollar value for which the order qualifies. You can set this field to .01 to create an automatic ship via override for an offer or source code. *Numeric, 13 positions with a 2-place decimal; required.*
From SCF	The lowest SCF in the series to be eligible for the override. You can use this field and the next to restrict qualifying orders by geographical location. If only one SCF is eligible, you would enter it in both the From and To SCF fields. SCF codes are defined in and validated against the SCF Code table. See Working with SCF Codes (WSCF). *Alphanumeric, 3 positions; optional.*
To SCF	The highest SCF in the series to be eligible for the override. The system does not validate that every SCF between the From and To SCF you enter exists. For example, if you enter 011 in the From SCF field and 020 in the To SCF field, the system accepts this range even if 019 is not a valid SCF in your company. *Alphanumeric, 3 positions; required if you enter a From SCF.*
Ship via	The code representing the shipper to use on qualifying orders. Ship vias are defined in and validated against the Ship Via table; see Working with Ship Via Codes (WVIA). *Numeric, 2 positions; required.*

Copy Offer Ship Via Screen

Purpose: Use this screen to copy the ship via overrides from one offer or source code to a different offer or source code. You can copy overrides only to a source code or offer that currently does not have any ship via override information set up.

How to display this screen: Select Copy at the Work with Offer Ship Via Screen.

How to complete this screen: Each field on the Copy Offer Ship Via screen has been described at the Create Offer Ship Via Screen (Creating a Ship Via Override). To complete this screen and copy ship via override information:

1. Enter the offer or source code to use as the source of information in the *Copy from* area of the screen. You can specify only one source of information, either an offer or a source code
2. Enter each offer or source code to use as the target of information in the *Copy to* area of the screen. You can enter as many targets as you like, and there is no restriction on copying an offer to source codes or vice versa.
3. The system validates your entries and highlights any fields you need to correct. If any of the "to" offers or source codes currently have ship via overrides set up, the screen displays an error message. Correct any fields as necessary; or select Exit to exit the screen.

4. Select Accept to submit the copy. The Confirm Accept pop-up window displays; confirm the copy, or cancel it.
5. The system submits the job `OFR_SVAC`. This job copies each ship via override for the “from” offer or source to the “to” offers or sources.

Working with Lines of Business (WLOB)

Lines of business represent clients, or business units, in Order Administration. Each line of business contains assignments that represent a specific entity, division, or offer, or a combination of these three values.

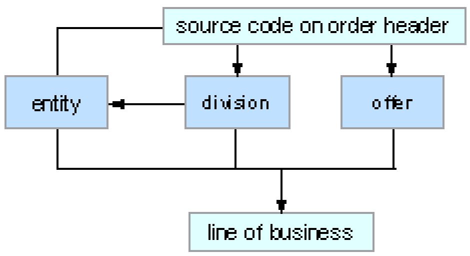
When an operator enters an order in order entry the system assigns each ship to customer to a line of business based on the entity, division, and offer associated with the order. The system uses the source code defined on the order header to determine which line of business to assign to an order based on the assignments defined for the line of business.

The system uses the line of business associated with each order to group all orders that contain a specific line of business together. You can then generate pick slips for the orders by line of business.

The system uses the following hierarchy to assign a line of business to an order ship to in order entry:

- the entity, division, and offer associated with the source code on the order header matches a specific line of business
- the offer and division associated with the source code on the order header matches a specific line of business
- the offer and entity associated with the source code on the order header matches a specific line of business
- the division and entity associated with the source code on the order header matches a specific line of business
- the offer associated with the source code on the order header matches a specific line of business
- the division associated with the source code on the order header matches a specific line of business
- the entity associated with the source code on the order header matches a specific line of business

Selecting the line of business for an order: The system uses the source code on the order header to determine the related division and offer. The related entity is determined based on the division associated with the source code on the order header.



Line of business order queue: You can review shippable orders based on the line of business assigned to each order. The system further defines orders assigned to a specific line of business by:

- orders containing one reserved and unprinted open order line
- orders containing more than one reserved and unprinted open order line
- whether the order includes a bulk item
- whether the order includes a gift-wrapped item
- the ship via priority defined for the ship via on the order header

> **Note:**
>
> You must select Update Statistics in Displaying the Line of Business Order Queue Summary (DLOQ) or submit the LOBSTATS periodic function to view the most current line of business order queue.

For more information:

- reviewing the line of business order queue for each line of business and generating pick slips by line of business, gift wrap orders, bulk orders, or ship via priority: Displaying the Line of Business Order Queue Summary (DLOQ)
- processing credits by line of business and dollar amount: Processing Credits by Line of Business (MCLB)

In this topic:

- Work with Line of Business Screen
  - Create Line of Business Screen
  - Display Line of Business Screen (Displaying Line of Business Order Queue)
- Work with Line of Business Assignment Screen
  - Create Line of Business Assignment Screen

Work with Line of Business Screen

How to display this screen: Enter WLOB in the *Fast path* field at the top of any menu or select Work with Line of Business from a menu.

Field	Description
LOB code (Line of business code)	A code that represents a line of business. *Alphanumeric, 3 positions; optional.*
Description	A description of the line of business code. *Alphanumeric, 40 positions; optional.*

Screen Option	Procedure
Change a line of business description	Select Change for a line of business to advance to the Change Line of Business screen. At this screen, you can change the line of business description only. See Create Line of Business Screen for a description of the fields on this screen.
Delete a line of business	Select Delete for a line of business to delete it. **Note:** The following error message indicates if you try to delete a line of business that is assigned to an open order: `Cannot delete LOB, Order Exists`
Display a line of business order queue	Select Display for a line of business to advance to the Display Line of Business Screen (Displaying Line of Business Order Queue).
Work with line of business assignment	Select Assignments for a line of business to advance to the Work with Line of Business Assignment Screen.
Create a line of business code	Select Create to advance to the Create Line of Business Screen.

Create Line of Business Screen

Purpose: Use this screen to create a line of business code.

How to display this screen: On the Work with Line of Business Screen, select Create.

Field	Description
Line of business	A code that represents a line of business. **Note:** The system cannot assign a line of business to an order unless at least one line of business assignment exists for the line of business code. See Work with Line of Business Assignment Screen. *Alphanumeric, 3 positions.* *Create screen: required.* *Change screen: display-only.*
Line of business description	A description of the line of business. *Alphanumeric, 40 positions; required.*

Completing this screen: You advance to the Create Line of Business Assignment Screen, where you can create an assignment for the line of business you just created.

Display Line of Business Screen (Displaying Line of Business Order Queue)

Purpose: Use this screen to review the line of business order queue. You can use the line of business order queue to review statistics for orders that are associated with a specific line of business, such as:

- the total number of orders that contain only one reserved and unprinted open order line
- the total number of orders that contain more than one reserved and unprinted open order line
- the number of single line and multiple line gift wrap orders
- the number of single line and multiple line bulk orders
- the number of orders for each ship via priority

> **Note:**
>
> You must select Update Statistics in Displaying the Line of Business Order Queue Summary (DLOQ) or submit the LOBSTATS periodic function to view the most current line of business order queue.

How to display this screen: On the Work with Line of Business Screen, select Display for a line of business.

Field	Description
LOB (Line of business code)	The code representing the line of business you are reviewing. *Alphanumeric, 3 positions; display-only.*
Description	The description of the line of business you are reviewing. *Alphanumeric, 40 positions; display-only.*
Last update	The date and time the information on this screen was last updated. You can update the line of business order queue by selecting Update Statistics in Displaying the Line of Business Order Queue Summary (DLOQ) or by submitting the LOBSTATS periodic function. *Numeric, 6 positions (in user date format); display-only.*
Single total orders	The total number of orders that have only one reserved and unprinted line in an open status for a specific line of business. *Numeric, 6 positions; display-only.*
Multi total orders	The total number of orders that have more than one reserved and unprinted line in an open status for a specific line of business. *Numeric, 6 positions; display-only.*
Single gift wrap orders	The total number of gift wrap orders that have one reserved and unprinted line in an open status for a specific line of business. This line must represent a gift wrap line (the Gift wrap field for this item is selected). *Numeric, 5 positions; display-only.*

Field	Description
Multi gift wrap orders	The total number of gift wrap orders that have more than one reserved and unprinted line in an open status for a specific line of business. *Numeric, 5 positions; display-only.*
Single bulk orders	The total number of bulk orders that have only one reserved and unprinted line in an open status for a specific line of business. This line must represent a bulk item (the Oversize field for the item is selected). *Numeric, 5 positions; display-only.*
Multi bulk orders	The total number of bulk orders that have more than one reserved and unprinted line in an open status, where one of the lines is for a bulk item, for a specific line of business. *Numeric, 5 positions; display-only.*
Single ship via priority 1	The total number of orders that contain only one reserved and unprinted line in an open status that is also defined as ship via priority 1 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Multi ship via priority 1	The total number of orders that contain more than one reserved and unprinted line in an open status that is also defined as ship via priority 1 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Single ship via priority 2	The total number of orders that contain only one reserved and unprinted line in an open status that is also defined as ship via priority 2 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Multi ship via priority 2	The total number of orders that contain more than one reserved and unprinted line in an open status that is also defined as ship via priority 2 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Single ship via priority 3	The total number of orders that contain only one reserved and unprinted line in an open status that is also defined as ship via priority 3 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Multi ship via priority 3	The total number of orders that contain more than one reserved and unprinted line in an open status that is also defined as ship via priority 3 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*

Field	Description
Single ship via priority 4	The total number of orders that contain only one reserved and unprinted line in an open status that is also defined as ship via priority 4 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Multi ship via priority 4	The total number of orders that contain more than one reserved and unprinted line in an open status that is also defined as ship via priority 4 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Single ship via priority 5	The total number of orders that contain only one reserved and unprinted line in an open status that is also defined as ship via priority 5 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Multi ship via priority 5	The total number of orders that contain more than one reserved and unprinted line in an open status that is also defined as ship via priority 5 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Single ship via priority 6	The total number of orders that contain only one reserved and unprinted line in an open status that is also defined as ship via priority 6 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Multi ship via priority 6	The total number of orders that contain more than one reserved and unprinted line in an open status that is also defined as ship via priority 6 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Single ship via priority 7	The total number of orders that contain only one reserved and unprinted line in an open status that is also defined as ship via priority 7 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Multi ship via priority 7	The total number of orders that contain more than one reserved and unprinted line in an open status that is also defined as ship via priority 7 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*

Field	Description
Single ship via priority 8	The total number of orders that contain only one reserved and unprinted line in an open status that is also defined as ship via priority 8 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Multi ship via priority 8	The total number of orders that contain more than one reserved and unprinted line in an open status that is also defined as ship via priority 8 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Single ship via priority 9	The total number of orders that contain only one reserved and unprinted line in an open status that is also defined as ship via priority 9 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Multi ship via priority 9	The total number of orders that contain more than one reserved and unprinted line in an open status that is also defined as ship via priority 9 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*

Work with Line of Business Assignment Screen

Purpose: Use this screen to set up the assignment combinations that will identify a particular line of business.

Line of business assignments represent the entity, division, or offer, or combination of these three values assigned to a line of business. The assignment determines which line of business the system assigns to an order in order entry. The system uses a line of business assignment to group all orders associated with a specific line of business together.

> **Note:**
>
> The system cannot assign a line of business to an order unless there is at least one line of business assignment for the line of business code.

How to display this screen: On the Work with Line of Business Screen, select Assignments for a line of business.

Field	Description
LOB (Line of business code)	The line of business code for which you are working with the line of business assignments. *Alphanumeric, 3 positions; display-only.*

Field	Description
Description	The line of business description for which you are working with the line of business assignments. *Alphanumeric, 40 positions; display-only.*
Entity	A code that represents an entity. Entities can represent the business units within your company (for example, mail order, retail, wholesale). Every sale, return, exchange, discount, and write-off is attributed to an entity. Entities should represent any organization within your company that is held accountable for sales performance. See Working with Entities (WENT). *Numeric, 3 positions; optional.*
Division	A code representing a division of your business. Divisions can represent groups within business units (for example, winter, spring, summer, fall, and holiday). See Working with Divisions (WDIV). *Alphanumeric, 2 positions; optional.*
Offer	A code representing a catalog, space, or advertisement used to present merchandise to your customers. See Working with Offers (WOFR). *Alphanumeric, 3 positions; optional.*

Screen Option	Procedure
Change a line of business assignment	Select Change for a line of business assignment to advance to the Change Line of Business Assignment screen. You can change any information on this screen. See Create Line of Business Assignment Screen for a description of the fields on this screen.
Delete a line of business assignment	Select Delete for a line of business assignment to delete it.
Display a line of business assignment	Select Display for a line of business assignment to advance to the Display Line of Business Assignment screen. You cannot change any information on this screen. See Create Line of Business Assignment Screen for a description of the fields on this screen.
Create a line of business assignment	Select Create to advance to the Create Line of Business Assignment Screen.

Create Line of Business Assignment Screen

Purpose: Use this screen to create an assignment for a specific line of business. Each assignment you create must be unique across all lines of business or the screen displays an error message similar to the following:

```
Combination of Ent/Div/Off Exists for LOB (4) (LOB 555)
```

How to display this screen: On the Work with Line of Business Assignment Screen, select Create. The system automatically advances you to this screen when you complete the Create Line of Business Screen.

Field	Description
LOB (Line of business code)	The line of business code for which you are creating an assignment. *Alphanumeric, 3 positions; display-only.*
Description	The line of business description for which you are creating an assignment. *Alphanumeric, 40 positions; display-only.*
Entity	A code that represents an entity. Entities can represent the business units within your company (for example, mail order, retail, wholesale). Every sale, return, exchange, discount, and write-off is attributed to an entity. Entities should represent any organization within your company that is held accountable for sales performance. Entity codes are defined in and validated against the Entity table. See Working with Entities (WENT). The following message displays if you enter an invalid entity in this field: `Entity does not exist.` *Numeric, 3 positions; optional.*
Division	A code representing a division of your business. Divisions can represent groups within business units (for example, winter, spring, summer, fall, and holiday). Division codes are defined in and validated against the Division table. See Working with Divisions (WDIV). The following message displays if you enter an invalid division code in this field: `Division does not exist.` The following message displays if you enter a division that does not relate to the entity you defined: `Division does not belong to the above Entity.` *Alphanumeric, 2 positions; optional.*
Offer	A code representing a catalog, space, or advertisement used to present merchandise to your customers. Offer codes are defined in and validated against the Offer table. See Working with Offers (WOFR). The following message displays if you enter an invalid offer code in this field: `Offer does not exist.` *Alphanumeric, 3 positions; optional.*

Displaying the Line of Business Order Queue Summary (DLOQ)

Purpose: Use the Display Line of Business Order Queue Summary to review statistics for orders that are associated with a line of business.

You can use the line of business order queue summary to review orders ready for shipment by line of business and then generate pick slips for the orders.

> **Note:**
>
> The number of orders displayed in the line of business order queue does not directly match the number of pick tickets the system can produce during pick slip generation.

Across all lines of business, the system provides a total of the number of orders that contain:

- only one reserved and unprinted open order line
- more than one reserved and unprinted open order line

For each line of business, the system also provides a total of the number of orders that contain:

- only one reserved and unprinted open order line
- more than one reserved and unprinted open order line

The system then breaks the total of the single and multiple line orders into buckets:

- gift wrap orders (the system defines a gift wrap order as an order that includes an item with the *Gift wrap* field selected).
- bulk orders (the system defines a bulk order as an order that includes an item with the *Oversized* field selected).
- ship via priority 1-9 (the system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order).

For more information: See Working with Lines of Business (WLOB), for more information on how to create a line of business and how the system assigns a line of business to an order.

In this topic:

- Line of Business Order Queue Summary Screen
- Updating the Line of Business Order Queue Statistics

Line of Business Order Queue Summary Screen

Purpose: Use this screen to review the statistics for each line of business.

> **Note:**
>
> The information on this screen is only as current as the last time the LOBSTAT batch program was run. See Updating the Line of Business Order Queue Statistics.

How to display this screen: Enter DLOQ in the *Fast path* field at the top of any menu, or select Display LOB Order Queue Summary from a menu.

Field	Description
Last update	The date and time when the system last refreshed the information on this screen. The system refreshes the information on this screen when you select Update Statistics to submit the LOB_STATS batch job or when you execute the LOBSTAT periodic function. See Updating the Line of Business Order Queue Statistics. *Date: Numeric, 6 positions (in user date format); display-only.* *Time: Numeric, 6 positions (HHMMSS format); display-only.*
Total single line orders	The total number of orders that contain one reserved and unprinted open order line across all lines of business. This number represents the total of all single line total order buckets for each line of business. *Numeric, 6 positions; display-only.*
Total multi line orders	The total number of orders that contain more than one reserved and unprinted open order line across all lines of business. This number represents the total of all multiple line total order buckets for each line of business. *Numeric, 6 positions; display-only.*
LOB	The code and description of a line of business. Line of business codes are defined in and validated against the Line of Business table. See Working with Lines of Business (WLOB). *LOB code: Alphanumeric, 3 positions; display-only.* *LOB description: Alphanumeric, 40 positions; display-only.*
Total ord singl (Total number of single line orders)	The total number of orders that contain one reserved and unprinted open order line for a specific line of business. This number represents the total of all single line ship via priority buckets for this line of business. *Numeric, 6 positions; display-only.*
G/W ord singl (Number of single line gift wrap orders)	The total number of orders that contain one reserved and unprinted open order line that is also defined as gift wrap (the *Gift wrap* field on the order detail line is selected) for a specific line of business. **Note:** The system includes each single line gift wrap order in a single line ship via priority bucket, based on the ship via priority for each order. *Numeric, 5 positions; display-only.*

Field	Description
Bulk ord singl (Number of single line bulk orders)	The total number of orders that contain one reserved and unprinted open order line that is also defined as bulk (the *Oversized* field for the item is selected) for a specific line of business. **Note:** The system includes each single line bulk order in a single line ship via priority bucket, based on the ship via priority for each order. *Numeric, 5 positions; display-only.*
Ship via priority 1 (Number of single line orders defined as ship via single priority 1)	The total number of orders that contain one reserved and unprinted open order line that is also defined as ship via priority 1 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Ship via priority 2 (Number of single line orders defined as ship via single priority 2)	The total number of orders that contain one reserved and unprinted open order line that is also defined as ship via priority 2 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Ship via priority 3 (Number of single line orders defined as ship via single priority 3)	The total number of orders that contain one reserved and unprinted open order line that is also defined as ship via priority 3 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Ship via priority 4 (Number of single line orders defined as ship via single priority 4)	The total number of orders that contain one reserved and unprinted open order line that is also defined as ship via priority 4 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Ship via priority 5 (Number of single line orders defined as ship via single priority 5)	The total number of orders that contain one reserved and unprinted open order line that is also defined as ship via priority 5 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Ship via priority 6 (Number of single line orders defined as ship via single priority 6)	The total number of orders that contain one reserved and unprinted open order line that is also defined as ship via priority 6 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*

Field	Description
Ship via priority 7 (Number of single line orders defined as ship via single priority 7)	The total number of orders that contain one reserved and unprinted open order line that is also defined as ship via priority 7 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Ship via priority 8 (Number of single line orders defined as ship via single priority 8)	The total number of orders that contain one reserved and unprinted open order line that is also defined as ship via priority 8 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Ship via priority 9 (Number of single line orders defined as ship via single priority 9)	The total number of orders that contain one reserved and unprinted open order line that is also defined as ship via priority 9 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. **Note:** Ship via priority 9 represents rush orders. *Numeric, 5 positions; display-only.*
Total ord multi (Total number of multiple line orders)	The total number of orders that contain more than one reserved and unprinted open order line for a specific line of business. This number represents the total of all multiple line ship via priority buckets for this line of business. *Numeric, 6 positions; display-only.*
G/W ord multi (Number of multiple line gift wrap orders)	The total number of orders that contain more than one reserved and unprinted open order line that also includes an order line defined as gift wrap (the *Gift wrap* field on the order detail line is selected) for a specific line of business. **Note:** The system includes each single line gift wrap order in a single line ship via priority bucket, based on the ship via priority for each order. *Numeric, 5 positions; display-only.*

Field	Description
Bulk ord multi (Number of multiple line bulk orders)	The total number of orders that include more than one reserved and unprinted open order line that also include an order line defined as bulk (the *Oversized* field for the item is selected) for a specific line of business. **Note:** The system includes each single line gift wrap order in a single line ship via priority bucket, based on the ship via priority for each order. *Numeric, 5 positions; display-only.*
Ship via priority 1 (Number of multiple line orders defined as ship multi via priority 1)	The total number of orders that contain more than one reserved and unprinted open order line that is also defined as ship via priority 1 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Ship via priority 2 (Number of multiple line orders defined as ship multi via priority 2)	The total number of orders that contain more than one reserved and unprinted open order line that is also defined as ship via priority 2 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Ship via priority 3 (Number of multiple line orders defined as ship multi via priority 3)	The total number of orders that contain more than one reserved and unprinted open order line that is also defined as ship via priority 3 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Ship via priority 4 (Number of multiple line orders defined as ship multi via priority 4)	The total number of orders that contain more than one reserved and unprinted open order line that is also defined as ship via priority 4 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Ship via priority 5 (Number of multiple line orders defined as ship multi via priority 5)	The total number of orders that contain more than one reserved and unprinted open order line that is also defined as ship via priority 5 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*

Field	Description
Ship via priority 6 (Number of multiple line orders defined as ship multi via priority 6)	The total number of orders that contain more than one reserved and unprinted open order line that is also defined as ship via priority 6 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Ship via priority 7 (Number of multiple line orders defined as ship multi via priority 7)	The total number of orders that contain more than one reserved and unprinted open order line that is also defined as ship via priority 7 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Ship via priority 8 (Number of multiple line orders defined as ship multi via priority 8)	The total number of orders that contain more than one reserved and unprinted open order line that is also defined as ship via priority 8 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. *Numeric, 5 positions; display-only.*
Ship via priority 9 (Number of multiple line orders defined as ship multi via priority 9)	The total number of orders that contain more than one reserved and unprinted open order line that is also defined as ship via priority 9 for a specific line of business. The system uses the ship via priority defined for the ship via on the order header to determine the ship via priority for the order. **Note:** Ship via priority 9 represents rush orders. *Numeric, 5 positions; display-only.*

Updating the Line of Business Order Queue Statistics

You can update the information on the Line of Business Order Queue Summary Screen and on the Display Line of Business Screen (Displaying Line of Business Order Queue) by selecting Update Statistics.

> **Note:**
>
> You can also process this batch program by running the PFR0034 periodic function.

The LOBSTAT batch program uses the following steps to update the information in the line of business order queue:

1. The system identifies all open orders that reference a line of business and updates the statistics for each line of business alphanumerically.
2. The system determines which of the open orders that contain a line of business are single line orders (the order includes only one open, reserved, and unprinted line). For each single line order, the system:
   - identifies the ship via priority using the ship via defined on the order header and updates the ship via priority buckets with the results.
   - adds up the quantity in each single line ship via priority bucket and defaults the total in the single line total orders bucket.
   - identifies all single line orders that contain a gift wrap item (the *Gift wrap* field for the line is selected).
   - defaults the total number of single line orders that contain a gift wrap item in the single line gift wrap orders bucket.
   - identifies all single line orders that contain a bulk item (the *Oversized* field for the item is selected).
   - defaults the total number of single line orders that contain a bulk item to the single line bulk orders bucket.
3. The system determines which of the open orders that contain a line of business are multiple line orders (the order includes more than one open, reserved, and unprinted line). For each multiple line order, the system:
   - identifies the ship via priority, using the ship via defined on the order header and updates the ship via priority buckets with the results.
   - adds up the quantity in each multiple line ship via priority bucket and defaults the total in the multiple line total orders bucket.
   - identifies all multiple line orders that contain a gift wrap item (the *Gift wrap* field for one or more of the lines on the order is selected).
   - defaults the total number of multiple line orders that contain a gift wrap item in the multiple line gift wrap orders bucket.
   - identifies all multiple line orders that contain a bulk item (the *Oversized* field for one or more of the items on the order is selected).
   - defaults the total number of multiple line orders that contain a bulk item to the multiple line bulk orders bucket.
4. The system performs the same steps to the next line of business in alphanumeric order.
5. The system updates the *Last update date and Last update time* fields with the date and time this batch program was performed.

> **Note:**
>
> When you submit the LOBSTAT batch program, the system checks to see if an active procedure for the company you are currently in is present. If an active procedure is present, the system displays the error message:
> `Cannot Run The Submit Job.`

You must wait until the batch job currently running has completed before submitting another batch job.

Screen Option	Procedure
Select the criteria you wish to use to generate a pick slip	Select Select Picks to advance to the Work with Streamlined Pick Slip Generation Screen.
Update statistics on this screen	Select Update Statistics to submit the LOBSTAT batch program that updates the information on this screen and on the Display Line of Business Screen (Displaying Line of Business Order Queue).

Creating SCF Ship Vias by SCF Range (MSSV)

Purpose: Use this menu option to create SCF ship via information for a selected SCF range, rather then entering this information for each SCF or drop point.

A Sectional Center Facility (SCF) code represents the first 3 digits of the destination postal code. A Ship Via code is used to indicate the areas (postal codes) where shippers deliver merchandise.

The system uses this information in order entry and order maintenance to ensure that the shipper assigned to the order can deliver to the shipping address on the order. You must create a record for every valid Ship Via/SCF combination. If a record does not exist for the ship via on an order and the SCF of the shipping address, order entry displays an error message: `Ship via is not valid with ship to zip code`.

You can also create SCF/ship via information using the following menu options:

- Working with SCF/Ship Via Values (WSHV)
- Editing SCF Ship Via (ESSV)

Create SCF Ship Vias by SCF Range Screen

Use this screen to create SCF ship via information for a selected SCF range.

To create:

1. Enter valid information in the *Country*, *SCF code range*, *Ship via code*, *Drop point*, *Shipping zone*, and optionally, *Shipping lead days* fields.
2. Select Accept. The system submits a job to create an SCF ship via value for each SCF in the range you defined.

You can review the SCF ship via information in the Working with SCF/Ship Via Values (WSHV) menu option.

How to display this screen: Enter MSSV in the *Fast path* field or select Create SCF Ship Via by SCF Range from a menu.

Field	Description
Country	The country where the SCF is located. Country codes are defined in and validated against the Country table; see Setting Up the Country Table (WCTY). *Alphanumeric, 3 positions; optional.*

Field	Description
SCF code range	The range of SCF codes for which you wish to create SCF ship via values. An SCF code represents the first 3 positions of the destination postal code. SCF codes are defined in and validated against the SCF table; see Working with SCF Codes (WSCF). *Alphanumeric, 3 positions; required.*
Ship via code	The shipper to deliver merchandise to the customer, such as 01 (UPS). Ship via codes are defined in and validated against the Ship Via table; see Working with Ship Via Codes (WVIA). *Numeric, 2 positions; required.*
Drop point	A code that represents one of your shipping warehouses or a central location to which merchandise will be shipped for consolidation. Drop points are used in zone skipping, which enables you to ship a carton by one carrier to a drop point, where another carrier picks up the carton and delivers it to its final destination. **Note:** If you are using the freight by order weight freight method, the drop point you define here must match the drop point you define in the Warehouse table. See Working with Weight Tables for Order Weight (WFTB). *Numeric, 3 positions; required.*
Shipping zone	The zone within the country where the carton is being shipped in relation to the drop point. Shipping zones are sections of the country that are defined by UPS. See About Zones. *Numeric, 2 positions; required.*

Field	Description
Shipping lead days	The number of days it takes the shipper to deliver merchandise to this SCF. **Calculation for pick slip preparation:** The system checks the arrival date for each line on an order to determine when to create a pre-generated pick. `Arrival Date from Order Line (or Order Ship To) - (Pick Processing Days (B37) + Ship Via Lead Days in WSHV) < or = Today's Date` The system creates a pre-generated pick for the order line if this system-calculated date is less than or equal to today's date; otherwise, the system does not create a pre-generated pick for the order line until the date is within the allotted time frame. See Selecting Order Lines for Pick Slip Preparation for additional details. **Calculation for Alternate Shipping Charges by Via window:** The system also uses this setting to calculate the Ship lead days and Expected delivery date to display at the Alternate Shipping Charges by Via Window in order entry, and this window uses a different calculation than the one described above. See the description of the Alternate Shipping Charges by Via Window for more information. *Numeric, 3 positions; optional.*

Shipping Zone Reservation

Topics in this part:

- Shipping Zone Reservation Overview provides a brief overview of the shipping zone reservation process, and provides a flow chart of the process of order entry for zone reservation items.
- Creating and Maintaining Geographic Zones (WGZN) describes how to set up and maintain geographic zones using zip codes or SCF codes.
- Creating and Maintaining Zone Reservation Codes (WZRC) shows you how to set up and maintain the zone reservation codes that will be assigned to weather-sensitive items to insure that they will ship at an optimal time for planting in the regions to which they are going.
- Creating and Maintaining Zone Reservation Dates (WZRD) describes zone reservation date windows and shows you how to set up and maintain zone reservation dates.

Creating and Maintaining Geographic Zones (WGZN)

Purpose: Use this menu option to create, change, delete, or display geographic zone information.

Use of geographic zones: Geographic zones are regions of the country which relate to relative weather conditions. Geographic zones are used by the zone reservation process to restrict shipping of weather-sensitive inventory such as plant stock. Each geographic zone will have a different date window during which particular kinds of stock can be shipped. See Shipping Zone Reservation Overview.

In this topic:

- Work with Geographic Zones Screen
  - Create Geographic Zones Screen

Work with Geographic Zones Screen

How to display this screen: Enter WGZN in the *Fast path* field at the top of any menu or select Work with Geographic Zones from a menu.

Field	Description
Geographic zone	A code that identifies the geographic zone. *Alphanumeric, 3 positions; display-only.*
Description	A description of the geographic zone. *Alphanumeric, 30 positions; display-only.*

Screen Option	Procedure
Create a geographic zone	Select Create to advance to the Create Geographic Zones Screen.
Change a geographic zone description	Select Change for a geographic zone to advance to the Change Geographic Zones screen. At this screen, you can change the description of the geographic zone. See Create Geographic Zones Screen for field descriptions.
Delete a geographic zone	Select Delete for a geographic zone to delete it.
Display a geographic zone description	Select Display for a geographic zone to advance to the Display Geographic Zones screen. You cannot change any information on this screen. See Create Geographic Zones Screen for field descriptions.

Create Geographic Zones Screen

Purpose: Use this screen to create a geographic zone.

How to display this screen: Select Create on the Work with Geographic Zones Screen.

Field	Description
Geographic zone code	A code that identifies the geographic zone. Geographic zones are used to divide the country into shipping regions for the purpose of restricting the shipment of climate-sensitive plant stock. *Alphanumeric, 3 positions.* *Create screen: required.* *Change screen: display-only.*
Description	A description of the geographic zone. *Alphanumeric, 30 positions; required.*

Creating and Maintaining Zone Reservation Dates (WZRD)

Purpose: Use the Work with Zone Reservation Dates menu option to create, change, delete, or display shipping zone date windows for each category of zone reservation coded items you have defined using Creating and Maintaining Zone Reservation Codes (WZRC).

About zone reservation dates: Zone reservation dates are the time windows you set up for shipping weather-sensitive inventory to different geographic zones in the country. For each zone reservation code, which identifies a category of weather-sensitive inventory stock such as bulbs, bare root plants, or potted plants, you specify the season in which it will be sold, then define a set of zone date windows corresponding to the geographic zones of the country. For example, potted plants would have a zone date window for each geographic zone in the country.

Each zone date window defines the following dates:

- Start date: the date you start shipping an item with this code.
- Deferred cutoff date: the backorder cutoff date. On or after this date you will not take orders for this item if the item is not available in your warehouse.

> **Note:**
>
> The Deferred cutoff date is not considered if you use alternate zone reservation rules, as controlled by the Use Alternate Zone Reservation Logic (I52) system control value. See Alternate Zone Reservation Rules for a discussion.

- Cutoff date: the cutoff date for taking orders, whether or not stock is available in your warehouse.
- End date: the last date for shipping the item.
- Next season open date: the start date of the next season for items with this code.

About season dates: Some zone reservation coded items may be sold in more than one season. You must set up a group of zone date windows for each season in which you plan to ship items with this zone reservation code. For example, a bare root plant from a spring catalog may have 10 zone date windows, corresponding to 10 geographic zones you have set up for the country. The same bare root plant offered in a fall catalog would have a different set of 10 zone date windows corresponding to the same 10 geographic zones.

For more information: See Shipping Zone Reservation Overview for an explanation of the zone reservation process.

In this topic:

- Work with Zone Reservation Dates Screen (Zone Date Windows)
  - Create Zone Reservation Dates Screen (Creating a Zone Date Window)

Work with Zone Reservation Dates Screen (Zone Date Windows)

Purpose: Use this screen to change, delete, display, or create information about the zone reservation date windows associated with each zone reservation code and season.

How to display this screen: Enter WZRD in the *Fast path* field at the top of any menu or select Work with Zone Reservation Dates from a menu.

Field	Description
Zone reservation	The zone reservation code. A code that identifies a type of weather-sensitive inventory item for which you have set up shipping restrictions by zone. See Creating and Maintaining Zone Reservation Codes (WZRC) for information on setting up and maintaining zone reservation codes. *Alphanumeric, 4 positions; optional.*
Season	A code which identifies the season to which the date window applies. See Working with Season Codes (WSEA). *Alphanumeric, 3 positions; optional.*
Geo. zone (Geographic zone)	A code which identifies the geographic zone to which the date window applies. See Creating and Maintaining Geographic Zones (WGZN). *Alphanumeric, 3 positions; optional.*
Start date	The shipping start date for the zone date window. *Numeric, 6 positions, in user date format; display-only.*
End date	The shipping end date for the zone window. *Numeric, 6 positions, in user date format; display-only.*

Screen Option	Procedure
Create a zone reservation date window	Select Create to advance to the Create Zone Reservation Dates Screen (Creating a Zone Date Window).
Change a zone reservation date window	Select Change for a zone reservation date window to advance to the Change Zone Reservation Dates screen. You can change any information except the zone reservation code, the season, and the geographic zone of the date window. See Create Zone Reservation Dates Screen (Creating a Zone Date Window) for field descriptions.
Delete a zone reservation date window	Select Delete for a zone reservation date window to delete it.
Display a zone reservation date window	Select Display for a zone reservation date window to advance to the Display Zone Reservation Dates screen. You cannot change any information on this screen. See Create Zone Reservation Dates Screen (Creating a Zone Date Window) for field descriptions.

Create Zone Reservation Dates Screen (Creating a Zone Date Window)

Purpose: Use this screen to define the Start date, Deferred cutoff date, Cutoff date, End date, and Next season open dates for a zone reservation date window.

How to display this screen: Select Create on the Work with Zone Reservation Dates Screen (Zone Date Windows).

Field	Description
Zone reservation	A code that identifies a type of weather-sensitive inventory item such as bare root plants, or hardy bulbs. Zone reservation codes are defined in and validated against the Zone Reservation Code table, and assigned in the Item table. See Creating and Maintaining Zone Reservation Codes (WZRC). *Alphanumeric, 4 positions.* *Create screen: required.* *Change screen: display-only.*
Season	A code which identifies the season to which the zone reservation date window applies. See Working with Season Codes (WSEA) for information on defining seasons. *Alphanumeric, 3 positions.* *Create screen: required.* *Change screen: display-only.*
Geographic zone	A code which identifies the geographic zone to which the date window applies. See Creating and Maintaining Geographic Zones (WGZN). *Alphanumeric, 3 positions.* *Create screen: required.* *Change screen: display-only.*
Description	A description of the zone date window. *Alphanumeric, 40 positions; required.*

Field	Description
Start date	The zone window start date, which is the date you plan to start shipping items tied to this zone date window. If using Standard Zone Reservation Rules: • For order lines taken prior to the season start date as well as prior to the zone window start date, the zone window Start date is set as the Arrival date for the order line, and the order line has a backorder status of Future order. See Shipping Zone Reservation Overview for information about Season dates and future orders. • For order types flagged to display *Zone Date Windows*, if an item tied to this zone date window is ordered before the zone window start date, the Display Zone Reservation Dates Window displays shipping start date information. If using Alternate Zone Reservation Rules: • For order lines taken prior to the season start date as well as prior to the zone window start date, provided there is an available quantity or open PO quantity for the item: – the zone window Start date is set as the Arrival date for the order line, and the order line has a backorder status of Future order. See Shipping Zone Reservation Overview for information about Season dates and future orders. – for order types flagged to display *Zone Date Windows*, if an item tied to this zone date window is ordered before the zone window start date, the Display Zone Reservation Dates Window displays shipping start date information. • For order lines taken prior to the season start date as well as prior to the zone window start date, if there is no available quantity or open PO quantity for the item, the Select Order Line Option Window provides the choice to either sell out the order line, or take the order line as a future order with the zone window's *Next season open date* as the order line's *Arrival date*. *Numeric, 6 positions, in user date format; required.*

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Deferred cutoff date (Backorder cutoff date)</td><td>On or after this date, backorders for items tied to this zone window will not be taken if you are using Standard Zone Reservation Rules. Under these rules:
if stock is available for an order tied to this zone window, orders taken on or after this date, but prior to the cutoff date, will be created with a backorder status of Zone Reservation, and will be reserved and shipped during pick generation.
if stock is unavailable for an item ordered on or after this date, the Select Order Line Option Window allows the operator to either sell out the order line, or take the order line as a future order with the zone window's Next season open date as the order line's Arrival date.
Note:
This date is not considered as part of Alternate Zone Reservation Rules,

This date cannot be prior to the start date. If you enter a date in this field which is prior to the start date, the screen displays the following error message:
<code>Deferred cutoff date cannot be prior to the start date.</code>
Numeric, 6 positions, in user date format; required.</td></tr>
<tr><td>Cutoff date</td><td>On or after this date, new orders will not be taken for items tied to this zone window, regardless of item availability. The Select Order Line Option Window provides the choice to either sell out the order line, or take the order line as a future order with the zone window's Next season open date as the order line's Arrival date. See Shipping Zone Reservation Overview.
This date cannot be prior to the deferred cutoff date. If you enter a date in this field which is prior to the deferred cutoff date, the screen displays the following error message when you select OK:
Cutoff date cannot be prior to deferred cutoff date.
Numeric, 6 positions, in user date format; required.</td></tr>
<tr><td>End date</td><td>The last date of the zone date shipping window; the date you plan to stop shipping items tied to this zone date window.
This date cannot be prior to the Cutoff date. If you enter a date in this field which is prior to the cutoff date, the screen displays the following error message when you select OK:
<code>End date cannot be prior to cutoff date.</code>
Numeric, 6 positions, in user date format; required.</td></tr>
</table>

Field	Description
Next season open date	The open date of the next season for items tied to this zone date window. This is the date displayed at the Select Order Line Option Window and loaded as the *Arrival date* for the order line if the order line is taken as a future order. See Shipping Zone Reservation Overview. This date cannot be prior to the End date. If you enter a date in this field which is prior to the End date, the screen displays the following error message when you select OK: `Next season open date cannot be prior to the current end date.` *Numeric, 6 positions, in user date format; required.*

Creating and Maintaining Zone Reservation Codes (WZRC)

Purpose: Use this menu option to create, change, delete, or display zone reservation code information.

Use of zone reservation codes: Zone reservation codes are used to identify weather-sensitive inventory, such as plant stock, for which you want to restrict shipping dates. Plant stock such as bulbs, bare root plants, or potted plants can be assigned zone reservation codes that will identify the date windows for shipping them to different regions of the country. Each zone reservation code will have a different set of restrictions. For example, hardy bulbs may have a longer shipping window than bare root plants. In this case, you would assign a different zone reservation code to hardy bulbs than to bare root plants. For each zone reservation code, you can set up date windows to restrict shipping to each geographic zone in the country. See Shipping Zone Reservation Overview, for a summary of the zone reservation process.

When do shipping zone reservation rules apply? Zone reservation processing requires the following information in order to process an order line under zone reservation rules:

- The item/SKU must be assigned a Zone reservation code to identify it as a zone reservation item.
- The offer associated with the order must be linked to a Season.
- The shipping address must be assigned to a geographic zone. The system uses zip codes or SCF codes to identify geographic zones. See Setting Up the Zip/City/State (Postal Code) Table (WZIP) for more information on zip codes and geographic zones. See Working with SCF Codes (WSCF), for more information on SCF codes and geographic zones.
- For each zone reservation code, you must define zone reservation date windows for all geographic zones in the country. See Creating and Maintaining Zone Reservation Dates (WZRD).

In this topic:

- Work with Zone Reservations Screen
- Create Zone Reservation Screen (Creating a Zone Reservation Code)

Work with Zone Reservations Screen

How to display this screen: Enter WZRC in the *Fast path* field at the top of any menu or select Work with Zone Reservation Codes from a menu.

Field	Description
Zone reservation	A code that identifies a type of climate-sensitive inventory item for which you want to set up shipping restrictions by zone. *Alphanumeric, 4 positions; display-only.*
Description	A description of the zone reservation code. *Alphanumeric, 30 positions; display-only.*

Screen Option	Procedure
Create a zone reservation code	Select Create to advance to the Create Zone Reservation Screen (Creating a Zone Reservation Code).
Change a zone reservation code description	Select Change for a zone reservation code to advance to the Change Zone Reservation screen. At this screen, you can change the description of the zone reservation code. See Create Zone Reservation Screen (Creating a Zone Reservation Code) for field descriptions.
Delete a zone reservation code	Select Delete for a zone reservation code to delete it.
Display a zone reservation code	Select Display for a zone reservation code to advance to the Display Zone Reservation screen. You cannot change any information on this screen. See Create Zone Reservation Screen (Creating a Zone Reservation Code) for field descriptions.

Create Zone Reservation Screen (Creating a Zone Reservation Code)

Purpose: Use this screen to create a zone reservation code.

How to display this screen: Select Create on the Work with Zone Reservations Screen.

Field	Description
Zone reservation	The zone reservation code. This code identifies a category of climate-sensitive inventory items for which you set up shipping restrictions by zone. *Alphanumeric, 4 positions.* *Create screen: required.* *Change screen: display-only.*
Description	The description of the zone reservation code. *Alphanumeric, 30 positions; required.*

Order Orchestration Drop Ship Integration

Chapters in this part: The following options are related to integration with Order Orchestration's Drop Ship Manager module.

- Interface with Order Orchestration's Supplier Direct Fulfillment Module: Overview and Setup describes the setup required for integration with Order Orchestration's Drop Ship Manager module.
- Supplier Direct Fulfillment Processing provides details on process flows and the communication between Order Administration and Order Orchestration's Drop Ship Manager.
- Downloading Drop Ship Vendors (ECSV) explains how to download initial vendor information for vendors using the Order Orchestration's Drop Ship Manager.
- Working with Retail Brands (WRBD) explains how to create and maintain retail brands for use with the Order Orchestration's Drop Ship Manager.
- Displaying Unprocessed Drop Ship Items (DUDS) describes the menu option you use to review all unprocessed drop ship items, including items fulfilled through integration with Order Orchestration's Drop Ship Manager.
- Printing Drop Ship Reports (PDSR) describes the reports you can use to print information related to orders fulfilled through integration with Order Orchestration's Drop Ship Manager.
- Working with Drop Ship Background Jobs (WPBJ) describes how to start, stop, and troubleshoot the CDC async job.
- Working with Drop Ship Errors (WDSE) describes the screen you use to review or delete records which went into error status when they were transferred between Order Orchestration's Drop Ship Manager and Order Administration.

Downloading Drop Ship Vendors (ECSV)

Purpose: Use this menu option to send vendors to Order Orchestration for drop ship fulfillment.

In this topic:

- Downloading Vendors to Order Orchestration
- Download Drop Ship Vendors Screen

Downloading Vendors to Order Orchestration

This option sends new or updated vendor information to Order Orchestration's Supplier Direct Fulfillment module through the CreateDSVendor message. Only vendors whose *Drop ship output* field on the Second Create Vendor Screen is set to OROB Drop Shipping are eligible to be sent to Order Orchestration.

The information sent to Order Orchestration includes:

- vendor code and description
- contact name and email address
- vendor address

Afterward, you can use the Order Orchestration screens to set vendor preferences, change carrier assignments, and set up vendor users.

Order Orchestration creates each new vendor in active status, and automatically assigns the vendor to all active carriers.

Other ways to create vendors in Oracle Retail Order Orchestration: You can create a new vendor in the Order Orchestration database by using the **Create Vendor** screen. You can also create a vendor by sending a purchase order for the vendor; however, when you create a new vendor this way, the only information sent from Order Administration about the vendor is the vendor code, name, and email address. You will need to complete the remaining setup for the vendor through the Order Orchestration **Edit Vendor** screen.

Transferred vendor information: The vendor information transferred to Order Orchestration through this menu option is from the Vendor table, with the exception of Vendor e-mail address, which is from in the Vendor Contact Table.

Updating an existing vendor: If the vendor record already exists in Order Orchestration and you or the vendor have updated the record there, processing the vendor download overwrites the existing information in Order Orchestration.

For more information: See the Order Orchestration Web Services Guide on My Oracle Support (ID 2953017.1) for more information on the contents of the CreateDSVendor message, and see the Order Orchestration online help for more information on completing vendor setup in Order Orchestration.

Download Drop Ship Vendors Screen

How to display this screen: Enter ECSV in the *Fast path* field at the top of any menu or select Download Drop Ship Vendors from a menu.

Screen Option	Procedure
Send vendor information to Order Orchestration	Select Submit to submit the batch job which transfers vendor information to Order Orchestration.

Displaying Unprocessed Drop Ship Items (DUDS)

Purpose: Use this menu option to review all of the drop ship order detail lines that have been entered but not yet processed through the Selecting Vendors for Drop Ship Processing (MDSP) menu option, including drop ship orders which you will process automatically using the Order Orchestration Drop Ship Integration.

Quotes: Drop ship items on quotes are not included in this menu option; see *Entering Pre-Order Quotes* for an overview and required setup.

Reviewing special handling instructions: This menu option allows you to review the special handling instructions associated with a drop ship item before you send the drop ship purchase order or pick slip to the vendor, and to access Order Maintenance, if you have secured feature authority to order maintenance. Additionally, when you advance to the Display Special Handling Screen or Display Custom Special Handling Screen using this menu option, you can access Order Maintenance to change the special handling instructions, if you have secured feature authority to order maintenance. See Working with User Records (WUSR) for information about user authority.

> **Note:**
>
> Drop ship order lines can be processed as drop ship pick slips, or drop ship purchase orders. Drop ship purchase orders, including drop ship purchase orders processed through Order Orchestration's Supplier Direct Fulfillment module support only custom special handling, not free-form special handling.

Display Unprocessed Drop Ship Items Screen

How to display this screen: Enter DUDS in the *Fast path* field at the top of any menu or select Display Unprocessed Drop Ship Items from a menu.

Field	Description
Item	The code you use to identify the item. Items are validated against the Item table. *Alphanumeric, 12 positions; display-only.*
SKU	The code that further identifies the item. SKUs are validated against the SKU table. *Alphanumeric, three 4-position fields; display-only.*
Description	A description of the item (not the SKU). *Alphanumeric, 30 positions; display-only.*
Order # - Ship-to #	The order number and ship-to suffix number of the drop ship item. *Order number: 8 positions, numeric; display-only.* *Ship-to number: 3 positions; numeric; display-only.*
Vendor #	The code which identifies the vendor for the drop ship item. Vendor codes are defined in and validated against the Vendor table. See Working with Vendors (WVEN). *Numeric, 7 positions; display-only.*
SH (Special Handling)	The special handling code associated with the drop ship item. Not displayed if no special handling is associated with the item. Special handling codes are defined in and validated against the Additional Charges table. See Work with Additional Charges Screen. *Alphanumeric, 2 positions; display-only.*

Screen Option	Procedure
Update the order	Select Maintenance for a drop ship item to advance to the Work with Order Screen in Order Maintenance. In order to access this screen, you must have secured feature authority to order maintenance. See Working with User Records (WUSR) for information about user authority.
Review order details	Select Display for a drop ship item to advance to the Display Order Detail Screen (Reviewing Order Line Detail).
Review special handling information	Select Special Handling for a drop ship item to advance to the Display Special Handling Screen or the Display Custom Special Handling Screen, if the item is associated with standard or custom special handling. When you advance to the Display Custom Special Handling screen or the Display Special Handling screen from this screen, you will be able to select the option to access Order Maintenance, if you have authority to Order Maintenance. See Working with User Records (WUSR) for information about user authority. If you Select Special Handling for a drop ship item that does not require special handling, the following message will display: `The selected line has no special handling instructions.`

Working with Retail Brands (WRBD)

Purpose: Use this menu option to create, change, delete, or display retail brand (retail division) information used by the integration with Order Orchestration's Drop Ship Manager module for internet-based drop ship processing.

Retail brands and descriptions associated with the source code on an order header are passed to Order Orchestration's Supplier Direct Fulfillment module each time purchase orders are sent. *Retail brands* appear on Order Orchestration screens as *Brands*.

Use in Order Orchestration's Supplier Direct Fulfillment module: In Order Orchestration, you can use retail divisions to:

- Restrict the display of information to the selected brand.
- Specify a logo, packing slip messages, pack slip form, and pull sheet form.
- Enable the vendor to restrict pack slip generation to a single brand.

Required setup for Order Orchestration's Supplier Direct Fulfillment module: In order to use Order Orchestration's Supplier Direct Fulfillment module, you must set up one or more retail brands and associate each retail brand with at least one entity in Order Management System; however, several entities (in one or more companies) could share the same retail brand. The source code on the drop ship order must point to a division associated with one of the entities for which you have defined a retail brand.

> **Note:**
>
> A retail brand is not necessarily associated with a single company; one company can have several retail brands, or several companies could share the same retail brand; however the Retailer ID is specific to a company. The *Retailer ID* is not necessary for integration with Order Orchestration's Supplier Direct Fulfillment module.

Work with Retail Brands Screen

How to display this screen: Enter WRBD in the *Fast path* field at the top of any menu or select Work with Retail Brands from a menu.

Field	Description
ID	A code that identifies the retail brand. *Numeric, 3 positions; display-only.*
Description	A description of the retail brand. *Alphanumeric, 30 positions; display-only.*

Screen Option	Procedure
Create a retail brand	Select Create to advance to the Create Retail Brand Screen.

Screen Option	Procedure
Change a retail brand description	Select Change for a retail brand to advance to the Change Retail Brand screen, where you can change the description. See the Create Retail Brand Screen for more information.
Delete a retail brand	Select Delete for a retail brand to delete it.
Display a retail brand description	Select Display for a retail brand to advance to the Display Retail Brand screen. You cannot change any information on this screen. See the Create Retail Brand Screen for field descriptions.

Create Retail Brand Screen

Purpose: Use this screen to create a retail brand.

How to display this screen: Select Create on the Work with Retail Brands Screen.

Field	Description
Brand ID	A code that identifies the retail brand. See Working with Retail Brands (WRBD) for a discussion. *Numeric, 3 positions.* *Create screen: required.* *Change screen: display-only.*
Description	A description of the retail brand. *Alphanumeric, 30 positions; required.*

Printing Drop Ship Reports (PDSR)

Purpose: Use this menu option to print one of three reports related to the Order Orchestration Drop Ship Integration.

Drop Ship Integration Reports Screen

How to display this screen: Enter PDSR in the *Fast path* field at the top of any menu or select Print Drop Ship Reports from a menu.

At this screen you can select any of the following reports:

- Drop Ship Integration Items on Hold from Vendor Report
- Drop Ship Integration Items with Revised Due Date Report
- Drop Ship Integration Items Pending Cancellation Report
- Drop Ship Integration Items Confirmed Cancellation Report
- Drop Ship Integration Items Sent to Integrated System Report
- Drop Ship Integration Items Pending Shipment Report
- Drop Ship Integration Items Shipped Report

Additionally, you can specify a date range for each report. Enter *From* and *To* dates in the user date format.

Periodic Process to Generate Drop Ship Reports

You can generate the first three reports through a periodic process which includes periodic functions which will generate the reports. The programs needed to create the periodic functions are:

- Drop Ship Items on Hold from Vendor: PFR0063
- Drop Ship Items with Revised Due Date: PFR0064
- Drop Ship Items Pending Cancellation: PFR0065

For more information: For information on creating periodic processes and functions, see Working with Periodic Functions (WPER).

Working with Drop Ship Background Jobs (WPBJ)

Purpose: Use this menu option to work with the CDC Async job used to process transactions between Order Orchestration's Supplier Direct Fulfillment module and Order Administration for each company that has the Use OROB Drop Shipping (H13) system control value selected.

Starting and stopping the job: If you are using Order Orchestration's Supplier Direct Fulfillment integration, the CDC async job should be stopped and started each day. If the CDC async job does not have the current date, returns which are sent from Order Orchestration's Supplier Direct Fulfillment module do show the current date. See Fulfillment (FUL) Periodic Functions under Scheduling Jobs for information on scheduling the job to start and stop on a daily basis.

Async status: The status of the async indicates whether it can process any information it receives.

- STARTED = The async is starting, but is not yet ACTIVE.
- ACTIVE = The async is up and running. In order to process information, the async must be in ACTIVE status.
- ENDING = The async is in the process of ending, but it not yet INACTIVE.
- INACTIVE = The async is not running.

When does the async look for records to process? The *Delay time* controls when the async looks for new records to process. This time determines the amount of time, in seconds, the async waits before looking for new records to process.

In this topic:

- Work with Drop Ship Background Jobs Screen
- Change Delay Time Screen
- Troubleshooting the CDC Async Job

Work with Drop Ship Background Jobs Screen

Use this screen to work with the CDC Async job.

How to display this screen: Enter WPBJ in the *Fast path* field or select Work with Drop Ship Background Jobs from a menu.

Field	Description
Job	The name of the async job. *Alphanumeric, 10 positions; optional.*

Field	Description
Status	The status of the async job. Valid status codes are: • STARTED = The async is starting, but is not yet ACTIVE. • ACTIVE = The async is up and running. In order to process information, the async must be in ACTIVE status. • ENDING = The async is in the process of ending, but is not yet INACTIVE. • INACTIVE = The async is not running. See Troubleshooting the CDC Async Job for information on correcting the status if necessary. *Alphanumeric, 10 positions; display-only.*
Start Date	The date the async was last started. *Numeric, 6 positions in user date format; display-only.*
Start Time	The time the async job was last started. *Numeric, 6 positions; display-only.*
Started By	The user ID of the person who last started the async job. *Alphanumeric, 10 positions; display-only.*
Ended By	The user ID of the person who last ended the async job. *Alphanumeric, 10 positions; display-only.*
Dly (Delay)	The number of seconds the async job waits for another record to process. *Numeric, 3 positions; display-only.*

Screen Option	Procedure
Change the delay time for the async job	Select Change for the async job to advance to the Change Delay Time Screen.

Screen Option	Procedure
Start the async job	Select Start for the async job to start it if it is inactive and not currently running on any server. **Periodic function:** You can also use the STRCSTD periodic function to start the CDC job. If the job is currently active, or the other conditions described below under *Troubleshooting* are met, an error in the APP.log might indicate: `IX_CDC Job not submitted - Previous job not ended`. See Logs for background. **Troubleshooting:** In order to start the async job, either at the screen or through a periodic function: • The Use OROB Drop Shipping (H13) system control value must be selected for at least one company in your Order Administration environment. • The async job must be in INACTIVE status and must not actually be running on any server. • There cannot be a Job History record for the IX_CDC job without an end date and time. You can review the records in the Job History table through Display Job History (DJHY). If the job does not end correctly (if, for example, the service stops while the job is running), you might need to update the Job History record in the database. • There cannot be an active procedure record for the FLX0976 program. You can review and, optionally, delete active procedures through Purge Active Procedures Across Users (MACX). See Troubleshooting the CDC Async Job for more information.
End the async job	Select End for the async job to end it. **Periodic function:** You can also use the ENDCDC periodic function to end the CDC job. **Note:** You can end the async job only if it is in ACTIVE status and is actually running on any server. See Troubleshooting the CDC Async Job for more information.
Work with background jobs	Select Background Jobs to advance to the Work with Background Jobs Screen.
Work with integration layer jobs	Select Integration Layer to advance to the Work with Integration Layer Process Screen.

Change Delay Time Screen

Purpose: Use this screen to change the *Delay time* for the CDC async job. The *Delay time* is the number of seconds that the async waits before looking for new records to process.

How to display this screen: Select Change for the CDC async at the Work with Drop Ship Background Jobs Screen.

> **Note:**
>
> You can display this screen for the CDC async job only if the Use OROB Drop Shipping (H13) system control value is selected for at least one company in your Order Administration environment.

Troubleshooting the CDC Async Job

There may be a problem with the CDC async job if transactions sent from Order Administration to Order Orchestration's Supplier Direct Fulfillment module, such as that new POs, are being processed, but transactions sent from Order Orchestration's Supplier Direct Fulfillment module to Order Administration, such as PO updates, are not being processed.

To solve the problem, stop and restart the CDC async.

If the CDC async job does not end when you use the End option: If the CDC async job does not end correctly, use the JOBCLN periodic function. This periodic function updates the CDC async job as follows:

If the IX_CDC is currently running on any server, the JOBCLN function does the following:

- If the status is INACTIVE, change it to ACTIVE.
- If there is not an active procedure, create it.
- If the status is STARTED or ENDING, do not change the status.
- If the job is in END, FINISHED or MSG at the Job Management (My Jobs) screen, update it to RUN and update Job History (Display Job History (DJHY)).

If the IX_CDC job is not currently running on any server, the JOBCLN function does the following:

- If the status is ACTIVE, STARTED, OR ENDING, update it to INACTIVE.
- If there is an active procedure, delete it.
- If the job is in any status other than END and FINISHED at the Job Management screen, update it to END and update Job History.

After the JOBCLN function ends, you can restart the job.

See Using the JOBCLN Function to Resolve Job Status Across Servers for more background.

Working with Drop Ship Errors (WDSE)

Purpose: Use this menu option to review drop ship transaction records passed to or received from Order Orchestration's Supplier Direct Fulfillment module that are in error in the CSF Transaction table (FLCSFT).

A drop ship transaction record received through the Order Orchestration Drop Ship Integration is in error status if the system cannot identify the record, for example:

- A shipment confirmation for a purchase order or purchase order line which does not exist.
- A status update such as a revised expected delivery date or a hold on a purchase order or purchase order line which does not exist.

- A return for an invalid return authorization, purchase order, or purchase order line number.

Purging Drop Ship Transaction records: You can use this menu option to delete records in error status from the CSF Transaction table (FLCSFT).

The screen sorts by date, time, type of error message, PO number, and PO sequence number. You can search for a record by entering the date and time it was created in the CSF Transaction table.

How to display this screen: Enter WDSE in the *Fast path* field at the top of any menu or select Work with CDC Drop Ship Errors from a menu.

Field	Description
Date	The date the record was created in the CSF Transaction table (FLCSFT). Enter a date in the*Date* search field to display records created on that date or later. *Numeric, 6 positions, in user date format.*
Time	The time the record was created in the CSF Transaction table. Enter a time in the *Time* search field to display records created at that time or later. *Numeric, 6 positions, HH:MM:SS format.*
Transaction type	The type of CSF Transaction record. Valid record types are: • Drop Ship PO Confirmed • Drop Ship PO Updated • Cancel Request Sent • Cancel Response Received • Cost Change • Drop Ship PO Modified (Address change) • Return Update Received • Return Authorization Cancelled *Alphanumeric, 25 positions, display-only.*
Error message	A brief description of the reason for the error. Possible error descriptions include: • Order detail not shipped • PODTDS record not found • Invalid transaction type • Invalid Vendor Item • Invalid RA header • Invalid RA detail • RA header completed • Invalid return quantity • Invalid return reason • RA cancel transfer failed • Missing Return Disposition • Receive/Confirm Error *Alphanumeric, 25 positions, display-only.*
PO Number	The purchase order number assigned by the system when you process drop ship purchase orders. *Numeric, 7 positions; display-only.*

Field	Description
Ln #	The purchase order detail line number. Up to 999 detail lines can be entered on a purchase order. *Numeric, 3 positions; display-only.*

Screen option	Procedure
Delete an error record from the CSF Transaction table (FLCSFT)	Select Delete for an error record. The record is deleted from the CSF Transaction table and no longer displayed on the screen.

Load USPS Zip Code File (LZPS)

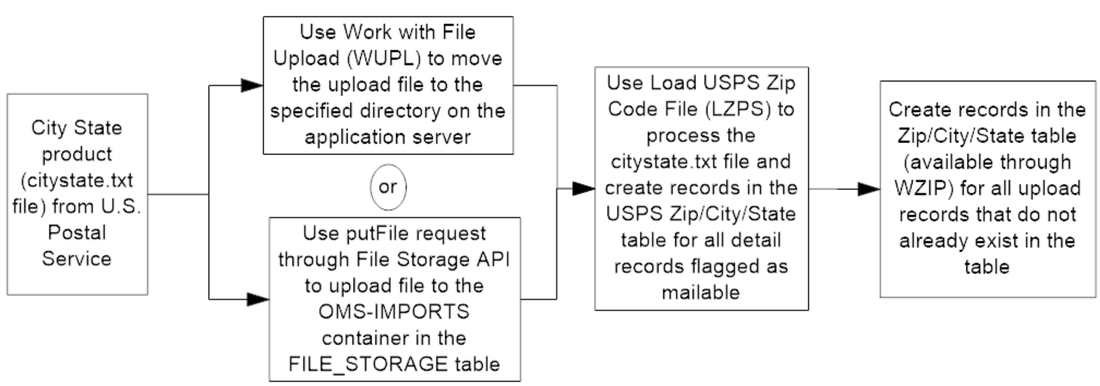
Purpose: Use this menu option to upload city/state/zip data from the U.S. Postal Service into the City/State/Zip (postal code) table.

Overview: The City State product, available from the U.S. Postal Service, provides a comprehensive list of ZIP codes with corresponding city and county names. Updates are available on a periodic basis. Uploading this information to Order Administration provides an automated means to create records in your City/State/Zip table and keep the data in the table complete and accurate.

In this topic:

- Upload Process
- Load USPS File Screen
- Fields in the USPS Zip/City/State Table
- Fields in the Zip/City/State Table
- Troubleshooting the Zip/City/State Upload

Upload Process



1. Download the City State Product from the USPS web site.
2. When you receive the City State product:

- Use the putFile request message in the File Storage API to upload the file to the OMS-IMPORTS container in the FILE_STORAGE table; otherwise,
- Use the Work with File Uploads (WUPL) menu option to copy the data file to the location on your application server specified in the CWDIRECTCP_USPS_UPLOAD_ FILE property. The file name matching is case-sensitive.

3. Use the Load USPS File Screen to submit the LZPS job, which uses the contents of the `ctystate.txt` data file to create records in the Zip/City/State table if these records do not already exist. The job performs the following steps:
   - Deletes any existing records in the USPS Zip/City/State work table and creates a record in this table for each eligible entry from the `ctystate.txt` data file. A record in the data file is eligible for upload if it is flagged with a D (detail) and is also flagged as mailable. See the Fields in the USPS Zip/City/State Table for mapping details.
   - Compares the data in the USPS Zip/City/State work table with the existing records in the Zip/City/State table. If a record in the work table does not exist in the Zip/City/State table, the job creates it.
   - If your current logging level supports it, the job uses the Application Log to track data such as the total number of records found in the data file and the total number of new records created in the.Zip/City/State table.

> **Note:**
>
> - The `ctystate.txt` data file as delivered by the U.S. Postal Service does not include delimiters between records, but the U.S. Postal Service does provide a utility to insert line breaks to make the data more readable.
>
>   > **Important:**
>   >
>   > **Do not use this utility to transform the presentation of the records in the data file; if you do, the Load USPS File job will not work.**
>
> - The job does not create City/State/Zip Tax records. To create tax records at the postal code level if needed, use Setting Up the Zip/City/State (Postal Code) Table (WZIP).
> - The entire process can take several minutes to a half hour to run. You can expect the job to take longer to run if you are creating records in the City/State/Zip table for the first time.
> - The job deletes the file after processing it successfully.
> - The job does not perform a partial update. If there are any errors, processing fails for the entire file, and the process moves the entire file in the OMS-ERRORS container of the FILE_STORAGE table.

For more information: See Troubleshooting the Zip/City/State Upload.

Load USPS File Screen

Before you start: Before you advance to this screen, confirm that you have used either the File Storage API or the Work with File Uploads (WUPL) menu option to upload the file. See the Upload Process for details.

How to display this screen: Select Load USPS Zip Code FIle from a menu, or enter LZPS in the *Fast path* field at the top of any menu.

City State data file found? When you select this menu option, the screen indicates whether there is a data file with the correct name in the location indicated by the properties file:

Message	Explanation
*****ERROR: File cannot be located.**	Indicates that there is no file with the correct name in either the FILE_STORAGE table if you used the File Storage API, or the CWDIRECTCP_ USPS_UPLOAD_ FILE folder if you did not use the file storage API. See Upload Process for details. Note that file name matching is case-sensitive.
*****ERROR: File is empty.**	Indicates that there is a file using the correct name in the directory or container indicated, but it contains no data.
File has been found and is ready to be loaded. Click Accept to submit.	Indicates that you can proceed with the upload process. **Note:** This message indicates that the system has located a file with the correct name and location, based on whether the file storage API is in use, and that it contains data. It does not indicate whether the file includes postal code data or whether it is in the correct format. See Troubleshooting the Zip/City/State Upload for possible problems and steps to correct.

Completing this screen: If the file has been found and is ready to be loaded:

1. Optionally, deselect the *Submit on hold* option if you would like the job to run immediately; otherwise, you will need to select Release for the LZPS job at the Job Management Screen when you are ready to run it.
2. Click Accept to begin the upload process and launch the LZPS job. You might expect the job to take several minutes to a half hour to complete, depending on how many new postal code records you are loading.

Updates: See the Upload Process for an overview of the processing steps.

Fields in the USPS Zip/City/State Table

Purpose: The LZPS job reads each record in the file in the FILE_STORAGE table or specified by the CWDIRECTCP_ USPS_UPLOAD_ FILE property (the City State product file from the U.S. Postal Service) that is:

- flagged with a detail code of D
- identified as mailable by a setting of N at byte 56

The job clears the previous contents of the USPS Zip/City/State work table and then writes the selected records from the City State data file into the USPS Zip/City/State work table as follows:

USPS Zip/City/State work table	City State data file from U.S. Postal Service
Copyright detail code	D
Zip code	Bytes 2-6
City state key	Bytes 7-12
City state name	Bytes 14-39 (last 3 bytes are truncated)
City st mail name ind	Byte 56
State abbrev	Bytes 100-101

The remaining fields in the USPS City/State/Zip work table are left blank.

Fields in the Zip/City/State Table

After creating the records in the USPS City/State/Zip table, the LZPS job creates new records in the City/State/Zip table if they do not already exist, mapping the data from the USPS City/State/Zip table as follows:

City/State/Zip table	Source
Zip	*Zip code* from USPS Zip/City/State work table
State	*State abbrev* from USPS Zip/City/State work table
City	*City state name* from USPS Zip/City/State work table
Company	The company number where you ran the LZPS job
Country	The Default Country for Customer Address (B17) in the company where you ran the LZPS job

The remaining fields in the City/State/Zip table are left blank.

Troubleshooting the Zip/City/State Upload

Question	Answer
How long does it take to upload postal codes?	It can take several minutes to a half hour to upload postal codes for the first time.
Where can I obtain the postal code data?	The U.S. Postal Service can provide the City State product, which includes a comprehensive list of ZIP codes and related cities and states.
Where does the LZPS job look for the City State data file I obtained from the U.S. Postal Service?	The temporary location on the Order Administration application server where the system should look for the City State data file when you use the Load USPS File Screen to update postal code data. This property is set by Oracle and cannot be changed. **Note:** If you are using multiple application servers, you need to update this setting on each server where you plan to use theLoad USPS File Screen to update postal code data.

Question	Answer
How can I check on whether the postal codes were uploaded successfully?	If you are uploading the information for the first time, you can select the Setting Up the Zip/City/State (Postal Code) Table (WZIP) option to see if records have been created. If you are performing a periodic update, you can check the application log, provided your logging level supports it; see below for more information.
What do log entries look like for a successful upload?	Sample log entries indicating a successful upload: `10:41:44,267 INFO APP - LZPS total records in delivered file = 466079` `10:41:44,267 INFO APP - LZPS total detail records = 80174` `10:41:44,267 INFO APP - LZPS total detail records flagged as Do Not Mail = 25035` `10:41:44,267 INFO APP - LZPS total detail records flagged as Mail =55139` `10:41:44,267 INFO APP - LZPS total detail records written to USPS file = 55139` **Note:** The total number of detail records written reflects those detail records in the data file that were eligible for selection as described in the Upload Process, and were created in the USPS City/State/Zip work file. This number might not be the same as the total number of records added to the City/State/Zip table, since the job does not add a record to the City/State/Zip table if the record already exists. The trace, app, and CWDirect log files contain entries if the upload was not successful, depending on the current logging level.

Question	Answer
What is the importance of the total number of records noted in the application log?	`total records in delivered file`: the total number of records in the data file located at the file name and directory specified in the CWDIRECTCP_ USPS_UPLOAD_ FILE property or in the FILE_STORAGE table. `total detail records`: the total number of records in the data file flagged with a D (detail). `total detail records flagged as Do Not Mail`: the total number of records in the data file flagged with a D (detail) but also flagged as Do Not Mail (not mailable), and so are not eligible for selection. `total detail records flagged as Mail`: the total number of records in the data file flagged as mailable and that were also flagged with a D (detail). **Note:** Only records in the data file that are flagged with a D and are also flagged as mailable are eligible for selection. `total detail records written to USPS file`: the total number of records in the data file that were eligible for selection and were added to the USPS City/State/Zip work table. This total may differ from the number of records added to the City/State/Zip table, since some or all of the records written to the USPS City/State/Zip work table might already exist in the City/State/Zip table.
I uploaded the `ctystate.txt` file from the U.S. Postal Service. Why didn't it create any records?	Possible explanations: • The U.S. Postal Service provides a utility to add delimiters between each record in the data file and make the file more readable. If you ran this utility against the data file, the LZPS job will not be able to read any records in the file. Re-copy the data file from the CD and start the upload process again. • If you have recently run an upload and are attempting to upload the same data again, there will be no new records eligible to be copied to the City/State/Zip table.
How often do I need to upload new postal code data?	The U.S. Postal Service provides updated data files on a periodic basis. See their web site for more information.
Does the postal code data upload also create tax rate information?	The LZPS job does not create Zip/City/State Tax records. You can use the Setting Up the Zip/City/State (Postal Code) Table (WZIP) option to create tax records at the postal code level if needed; however, you might not need these records at the postal code level if you set tax rates at the SCF level, or if you use the generic tax integration to calculate tax.
There are still records in the USPS City/State/Zip work table. Does this indicate a problem?	This does not indicate a problem. The LZPS job does not clear the records in the work table after processing an upload; instead, it clears the records when it begins a new upload.

8
Installation Setup

- Establishing Security
- Using the Menu Driver
- System Control Values and Number Assignments
- Setting Up Secured Features

Work with System Values/Features (WSYS)

For information on:	See:
The System Control table, including how to set up and change values	System Control Table Components
A particular system control value	System Control Values
Secured features	Setting Up Secured Features

Establishing Security

Topics in this part:

- Security Shell Components provides an overview of the security features on the system.
- Working with Companies (WCMP) describes how to create a company and control security by company.
- Setting Up User Classes (WUCL) describes how to create user classes and control access to menus and menu options by groups of users. This topic also describes how to assign authority to companies, menu options, secured features and user-defined functions for a user class.
- Working with User Records (WUSR) describes how to create user profiles and control access to menus and menu options by individual user. This topic also describes how to assign authority to companies, menu options, secured features and user-defined functions for an user individual user.
- Working with Threshold Values (WTHR) describes how to create threshold values for defined functions in the system.

Working with Companies (WCMP)

Purpose: Use Work with Companies to work with a company on your system.

You must define at least one company in order to use Order Administration. Information throughout Order Administration is segregated by company.

Companies are single, isolated sets of tables and data: an organization of financial information, inventory, and customers. Essentially a company has a completely separate database from other companies.

When should you create more than one company? You must create another company when you do not want data, for example sales analysis figures, items, and customers, to mix with another company's data. If you only want to separate sales analysis, you can handle that through entities and divisions.

Creating a company: You can use the COPYCMP Copy Company periodic function to create a company based on the data defined for an existing company.

> **Note:**
>
> COPYCMP will not run if the “from” company has any EFTConnect configured merchant accounts. That is, having any merchant account record in the Payment Configuration screen.
>
> The copy company (COPYCMP) should only be done from 49 or 51 where EFTConnect is not enabled in the "from" company.
>
> If EFTConnect is enabled, the Copy Company periodic function cannot be run for copy or delete processes.

This periodic function uses the following parameters to create a company:

- the From company number whose data you wish to copy.
- the To company number.
- Y or N setting indicating whether the system should delete the data in the To company before copying. Note: Unless you can verify that you are not copying over any records that already exist in the target company, this setting should be set to N.

Separate each parameter setting with a single space. For example, enter the following in the Parameter field, where 1 is the From company number, 2 is the To company number, and N is the Delete To company parameter: DB 1 2 N

Using the copy company periodic function to delete a company: To use the Copy Company periodic function to delete a company, enter the company you wish to delete in the From and To company parameters and set the Delete parameter to Y. For example, enter the following in the Parameter field, where 1 is the company you wish to delete, and Y is the Delete parameter: 1 1 Y

Copy Company Parameters	If Destination Company Exists	If Destination Company Does Not Exist
98 99 Y	Deletes destination company and copies all data from source company	Creates destination company and copies all data from source company
98 99 N	Does not copy any data, since destination company already exists	Creates destination company and copies all data from source company

Copy Company Parameters	If Destination Company Exists	If Destination Company Does Not Exist
98 98 Y	Deletes destination company	No change
98 99 N	No change	No change

In this topic:

- Work with Companies Screen
- Change Company Screen
- Work with Company Phone Numbers Screen
- Work with Company Return Address Screen
- Work with Shared Companies Screen

Work with Companies Screen

Purpose: Use this screen to change, delete, or display a company.

How to display this screen: Enter WCMP in the Fast Path field or select Work with Companies from a menu.

Field	Description
Company	A code representing a company. Numeric, 3 positions; optional.
Description	The name of the company. Alphanumeric, 30 positions; optional.

Screen Options	Procedure
Change a company	Select Change for a company to advance to the Change Company Screen.
Delete a company	Select Delete for a company to delete it.
Display a company	Select Display for a company to advance to the Display Company screen. You cannot change any information on this screen. See Change Company Screen for a description of the fields on this screen.
Work with phone numbers for computer telephony integration	Select Phone #s for a company to advance to the Work with Company Phone Numbers Screen.
Enter or change the return address for printing on customer return labels from the web storefront	Select Return address for a company to advance to the Work with Company Return Address Screen.
Define other companies that share inventory with the parent company	Select Shared Companies for a company to advance to the Work with Shared Companies Screen.
Work with user defined field	Select User Field for a company to advance to the Work with User Fields Screen.

Change Company Screen

Purpose: Use this screen to change a company on the system. .

How to display this screen: Select Change at the Work with Companies Screen

Field	Description
Company	The company code (001 - 999). Information throughout the system is segregated by company. You can assign or prohibit access to companies to users and user classes. See Working with User Records (WUSR), and Setting Up User Classes (WUCL). Numeric, 3 positions; display-only.
Description	The company's name or description, which appears on many screens and reports. **Note:** The system does not validate the company's address in the same way it validates a customer's address, as in order entry. For example, it does not validate that the state is associated with the SCF for the postal code. Alphanumeric, 30 positions; required.
Address	The company's address. Alphanumeric, two 32-position fields; optional.
City	The company's city. Alphanumeric, 25 positions; optional.
State	The code representing the company's state or province. Alphanumeric, 2 positions; optional.
Zip	The company's zip or postal code. Alphanumeric, 10 positions; optional.
Country	The company's country. Country codes are defined in and validated against the Country table. See Setting Up the Country Table (WCTY). Alphanumeric, 3 positions; optional.
Locale	The locale assigned to the company, identifying the language that the system uses for reports and HTML email templates. The locale defined in the DEFAULT_LOCALE property initially defaults, but you can override it. Available locales are: • English • French • German • Italian • Spanish The setting of the locale here controls the settings that are available for the BI Date and Separator Format, below. See: • Regional Settings for an overview. • Where are Date Formats Applied? for more information on which date format the system uses in different areas of the application. • Where are Number Format Applied? for more information on the decimal and thousand separators the system uses in different areas of the application. Required.

Field	Description
BI Date and Separator Format	The date and separator formats to use on reports generated through Oracle Analytics Cloud. See Reports and Forms Generated through Oracle Oracle Analytics Cloud for a listing of these reports, and see Oracle Analytics Cloud Date and Separator Formats for a listing of the formats applied on these reports through this setting. The Locale setting controls the BI Date and Separator Formats. If the Locale is set to: • English: Available BI Date and Separator Formats: – English (Australia) – English (Canada) – English (India) – English (Ireland) – English (New Zealand) – English (South Africa) – English (United Kingdom) – English (United States) (default) • French: Available BI Date and Separator Formats: – French (Belgium) – French (Canada) – French (France) (default) – French (Luxembourg) – French (Switzerland) • German: Available BI Date and Separator Formats: – German (Austria) – German (Germany) (default) – German (Luxembourg) – German (Switzerland) • Italian: Available BI Date and Separator Formats: – Italian (Italy) (default) – Italian (Switzerland) • Spanish: Available BI Date and Separator Formats: – Spanish (Argentina) – Spanish (Bolivia) – Spanish (Chile) – Spanish (Columbia) – Spanish (Costa Rica) – Spanish (Dominican Republic) – Spanish (Ecuador) – Spanish (El Salvador) – Spanish (Guatemala) – Spanish (Honduras) – Spanish (Mexico) – Spanish (Nicaragua) – Spanish (Panama) – Spanish (Paraguay) – Spanish (Peru) – Spanish (Puerto Rico) – Spanish (Spain) (default) – Spanish (Uruguay) – Spanish (Venezuela)

Field	Description
Date Format	The date format assigned to the company, identifying the format of the date that displays for the company on screens. The date format defined in the DEFAULT_DATE_FORMAT property initially defaults, but you can override it. Valid values are: • DDMMYY = The default date format for the company is DDMMYY; for example, if the date is December 25 2016, the date displays as 251216. • MMDDYY= The default date format for the company is MMDDYY; for example, if the date is December 25 2016, the date displays as 122516. • YYMMDD = The default date format for the company is YYMMDD; for example, if the date is December 25 2016, the date displays as 161225. **Note:** In order to have a consistent date format on all reports, the DEFAULT_DATE_FORMAT property and this setting should be the same. See: • Regional Settings for an overview. • Where are Date Formats Applied? for more information on which date format the system uses in different areas of the application. • Where are Number Format Applied? for more information on the decimal and thousand separators the system uses in different areas of the application. Required.
Phone number	The company's phone number. Numeric; one 3-position field (area code) and one 8-position field (phone number).
Fax Phone number	The company's fax number. Numeric; one 3-position field (area code) and one 8-position field (phone number).
From Email Alias	The alias to display with the “from” address for emails, for example, My Email Alias <no-reply@omni.retail.oraclecloud.com>. The actual “from” address is set by Oracle and cannot be changed. The system uses the following hierarchy in selecting the “from” email alias: 1. Order Type/Entity: If a *From email alias* is specified at the Create Entity Order Type Template Screen or Change Entity Order Type Template Screen, use this alias; otherwise, 2. Entity: If a *From email alias* is specified at the Work with Entity Email Overrides screen for the email notification type, use this alias; otherwise, 3. Company: If a *From email alias* is specified at the Change Company screen, use this alias; otherwise, 4. Display just the actual email address of no-reply@omni.retail.oraclecloud.com without including an alias The threshold monitor also uses the alias specified for the company. See Working with Threshold Values (WTHR). Alphanumeric, 50 positions; optional.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Cross company scan</td><td>Indicates whether you can scan for customers across companies in Order Entry, standard Order Inquiry, and Order Maintenance.

Valid values are:

Selected = You can scan for customers across companies, if both the “home” and “target” companies:

have selected the Cross company scan field
have the same value in the Active company field (that is, active companies can scan into other active companies; inactive companies can scan into other inactive companies)

Standard Order Inquiry and Order Maintenance

You can use cross-company scanning with the match code, postal code, postal code with company name, and postal code with customer name fields.See Setting Up Match Codes (MMCH) and Setting Up the Zip/City/State (Postal Code) Table (WZIP).

Order Entry

The source code field is at the top of the Select Customer Sold To Screen or the Customer Scan Screen, enabling cross-company scanning by source code, provided the user does not select to scan for a customer from the Customer Selection Screen.
Unselected = You cannot scan for customers across companies. The source code field is not on the Select Customer Sold To for Order screen.
</td></tr>
<tr><td>Active company</td><td>Indicates whether this company is currently active. This field works with the Cross company scan field to select or restrict the companies eligible for cross company scan. You might use this field to distinguish training or testing vs. “live” companies, to prevent users from inadvertently scanning into the wrong type of company. Also, if a company is flagged as inactive, the menu screen displays a message indicating This company is flagged as inactive and should not be used to process live orders.

Valid values are:

Selected = This company is active; you can scan across other active companies.
Unselected = This company is inactive; you can scan across other inactive companies. The Menu Driver Screen displays a message indicating This company is flagged as inactive and should not be used to process live orders.
</td></tr>
</table>

Field	Description
Cross company maintenance group	You assign a common cross company maintenance group code to a group of companies that share a portion of their customer base. By entering any group in this field, you enable the system to store information on the name or address of each customer you update in this company. You can then identify and update matching customer records within the maintenance group. This code can be any value that you define. Example: If you enter 5 in this field for companies 27, 123, and 495, you will be able to update customer records in companies 123 and 495 based on a change of address you process for the customer in company 27. If you enter B in this field for companies 44 and 66, you will be able to update customer records only across these two companies; the system will not update a record in company 44 based on an address change you process in company 27. In order for cross company maintenance to work between companies, both companies must use the same logic for composing match codes.See Setting Up Match Codes (MMCH) for more information on working with match codes.

Work with Company Phone Numbers Screen

Purpose: Use this screen to work with DNIS (dialed number identification service) phone numbers for computer telephony integration (CTI). The system uses the DNIS number for an incoming call to identify the company related to the call and to route the call appropriately.

The DNIS number is ordinarily the last four positions of the phone number that the customer calls; however, it is possible that the DNIS number is not the same as the actual phone number dialed. In this situation, you can create a company phone number that does not actually exist, but whose last four positions match the DNIS number that you will receive through your CTI application.

> **Note:**
>
> CTI is not currently implemented.

For more information: Contact your Order Administration representative for more information on implementing CTI.

Work with Company Return Address Screen

Purpose: Use this screen to create or edit the company address to print on return labels. The system uses this address only if your web storefront supports printing these labels for return authorizations when customers enter returns on the storefront.See the E-Commerce Interface for more information.

Entity return address overrides company address: If you define an return address for the entity associated with an order at the Work with Entity Return Address Screen, the system uses the entity return address instead.

If no entity or company return address: If a return address is not specified for the entity associated with the order or for the company, the system uses the address for the Default Warehouse (A04).

How to display this screen: Select Return address for a company at the Work with Companies Screen.

Completing this screen: Enter the address to appear on return labels for use when customers enter returns through your web storefront. To delete the return address, select Delete.

Work with Shared Companies Screen

Purpose: see this screen to define other companies that share inventory with the parent company. Companies display on this screen in shared company sequence.

Example: If company 555 is the company where the inventory is located, company 555 represents the parent company and any other company that shares inventory with this company is considered a shared company.

> **Note:**
>
> You do not need to define shared companies if you are using inventory sharing; see Inventory Sharing (A69) for an overview.

Copying items in the parent company to the shared companies: If you wish to add, update, or delete items in shared companies, based on an item copied in the parent company, you must define shared companies using this screen.See Copying Items for an overview.

To create: Enter a company code and select OK to create a shared company. The company code must be a valid company. You cannot select the company code that represents the parent company or the screen displays an error message: Shared company must not be the same as the parent company.

> **Note:**
>
> The system allows you to define a company as a shared company for more than one parent company. For example, you can define company 554 as a shared company for both company 555 and company 25. You can also define a shared company for a company that is also a shared company for another company. For example, you can define company 123 as a shared company for company 456, even if company 456 is a shared company for company 789.

To scan: Enter a company code and select OK to position to the shared company. If the company code does not exist as a shared company, the system creates it. The company code must be a valid company.

How to display this screen: Select Shared Companies for a company on the Work with Companies Screen.

Field	Description
Company	The code and name of the parent company. Code: Numeric, 3 positions; display-only. Description: Alphanumeric, 30 positions; display-only.

Field	Description
Cmp	A code representing a company that shares inventory with the parent company. If you prompt on this field, the system displays all valid Order Administration companies, not just the companies to which the user has authority. Numeric, 3 positions; display-only.
Description	The name of the company. Alphanumeric, 30 positions; display-only.

Screen Option	Procedure
Delete a shared company	Select Delete for a shared company to delete it. **Note:** Deleting a shared company does not delete the company; just the association between the company and the parent company.

Working with User Records (WUSR)

Purpose: Use Work with Users to update user records and control access to companies, menu options, secured features, alternate customer address formats and user-defined functions for individual users.

In this topic:

- Work with Users Screen
- Work with Company Authority Screen
- Work with Menu Option Authority Screen
- Work With Secure Feature Authority Screen
- Display User Option History Screen
- Work with User Tickler Group Screen

Related help topics:

- Setting Up User Classes (WUCL)

Work with Users Screen

Use this screen to change, delete and display a user record. You can also use this screen to assign authority to companies, menu options, secured features, user-defined functions or the screens that use an alternate customer address format.

How to display this screen: Enter WUSR in the Fast path field at the top of any menu or select Work with Users from a menu.

Field	Description
User	The ID of the user. Alphanumeric, 10 positions; optional.

Field	Description
Name	The user's name. Alphanumeric, 30 positions; optional.
Authority	The default menu option authority level for the user. Valid authority types are: • Allow • Exclude (default setting) Optional.

Screen Option	Procedure
Change a user record	Select Change for a user to advance to the Change User Record screen. See the Administration guide for a description of the fields on this screen.
Delete a user record	Select Delete for a user to delete it from Order Administration. **Note:** Deleting a user here does not delete the user from IDCS or OCI IAM. Also, you cannot delete a user record that has dependent data, such as a scheduled job.
Display a user record	Select Display for a user to advance to the Display User Record screen. You cannot change any fields on this screen. See the User Administration guide for a description of the fields on this screen.
Assign company authority to a user	Select Company Auth for a user to advance to the Work with Company Authority Screen.
Assign menu option authority to a user	Select Menu Option Auth for a user to advance to the Work with Menu Option Authority Screen.
Assign feature authority to a user	Select Feature Auth for a user to advance to the Work With Secure Feature Authority Screen.
Assign a tickler group to a user	Select Tickler Group for a user to advance to the Work with User Tickler Group Screen.
View on-line history that shows the options taken by the user	Select View History for a user to advance to the Display User Option History Screen.
Generate a multi-factor authentication code for a user	Select Generate MFA Code to open the Generate MFA Code window. This window is not currently enabled.
Advance to Work with User Classes menu option	Select User Classes to advance to the Work with User Classes Screen.

Work with Company Authority Screen

Purpose: Use this screen to allow or exclude this user from access to other companies defined on your system.

How to display this screen: Select Company Auth for a user at the Work with Users Screen.

Field	Description
Comp (Company code)	The code for the company. Numeric, 3 positions; optional.
Description	The description of the company. Alphanumeric, 30 positions; optional.
Authorized	This field indicates whether the user has access to this company. • Yes = This user has access to this company. • No = This user does not have access to this company.

Changing access to companies: To change this user's access to a company, move your cursor to the value in the Authorized field and change it as necessary.
Select OK to update the screen.

Work with Menu Option Authority Screen

Use this screen to override the default authority assigned to a user and assign or prohibit access to specific menu options, either in Order Administration (Classic View), or in Modern View if the menu option is available in **Modern View**.

Menu option assignment for Modern View: In Modern View, for the most part a user's access to menu options is available through the Tasks option or the Pin the Menu option, and is based on the user's Default menu assignment in Work with Users; there is no Fast Path available in Modern View. However, if the user has authority to an menu option not included in their default menu or one of its sub-menus, the option is available in Modern View through a menu title of Additional Options.

Example: If a user is assigned authority to the MULO (unlock suspended order or batch) menu option, but the user's default menu does not include MULO, or include a sub-menu that includes MULO, the MULO option in Modern View is available under the menu title of Additional Options.

How to display this screen: Select Menu Option Auth for a user at the Work with Users Screen.

About authority: If an authority level has been previously assigned to a user for this menu option, the level appears next to the menu option under the User authority field. If the authority level does not display, the system will use the authority in the User class authority field (if defined). Otherwise, the system takes the user's default authority.

When you exclude a user from a menu option, the user may still be able to access the same type of functionality through other menu options. For example, you might exclude a user from the Create Item Warehouse/Locations (MIWL) option, but the user will still be able to create an item warehouse or an item location through Work with Warehouses (WWHS) or Work with Items/SKUs (MITM).

Field	Description
Menu option	The short name for the menu option. Alphanumeric, 4 positions; optional.
Description	The menu option description. Alphanumeric, 60 positions; optional.

Field	Description
User authority	Allows you to enter the authority level. Valid authority types are: • Allow • Display • Exclude Optional.

To delete: Select Delete for the option. The screen refreshes itself and the authority level disappears.

This delete option only deletes authority from a specific menu option for this user; it does not affect authority at the user class or user record level.

To assign:

1. Display = Select Display for this menu option to limit this user's access to inquiry only.
2. Allow = Select Allow for the menu option to allow this user to perform this menu option.
3. Exclude = Select Exclude for the menu option to prohibit access to this menu option.

The authority level you entered appears next to the menu option.

Work With Secure Feature Authority Screen

Purpose: Use this screen to override the default authority defined in the secure feature record, and assign or prohibit access to a secured feature for an individual user.

A secured feature is a procedure or action that can be performed within a function by an individual user. For example, the ability to maintain batch totals and override prices in Order Entry are examples of secured features in the system.

An individual user might have access to Order Entry or the Purchase Order functions. However, within those functions, you might not want to give all who have access the authority to certain features, which the system has segregated as secured features.

Secured features can be created and maintained by using the Work with System Values/ Features function. See Setting Up Secured Features.

How to display this screen: Select Feature Auth for a user at the Work with Users Screen.

About authority: If an authority level has been previously assigned to a secured feature for this user, the level appears next to the feature under the User Authority field. If the authority level does not display, the system will use the authority in the User Class Authority field, if defined. See Work With User Class Feature Authority Screen. Otherwise, the system takes the default authority for the secure feature, which you set up at the Create Secure Feature Screen.

Field	Description
Appl (Application area)	The application area to which this secured feature belongs. Alphanumeric, 3 positions; optional.
Grp (Application group)	The application group to which this secured feature belongs. Alphanumeric, 3 positions; optional.

Field	Description
Secured feature	The description of the secured feature. Note: The system truncates the description to 55 positions. Alphanumeric, 60 positions; optional.
User authority	The authority level for this user. Valid authority levels are: • Allow • Display • Exclude Optional.

To delete: Select Delete for the feature. The screen refreshes itself and the authority level disappears.

This delete option only deletes authority from the specific secured feature for this user; it does not affect the authority assigned in the secure feature record.

To assign:

- Allow = Select Allow for the feature to allow this user to perform this secured feature, unless otherwise prevented by menu option authority.
- Display = Select Display for this feature to limit this user's access to inquiry only.
- Exclude = Select Exclude for the feature to prevent this user from accessing this secured feature.

The authority level you entered appears next to the secured feature.

Display User Option History Screen

Purpose: Use this screen to view the menu options selected by the user.

This information can help you reconstruct the options a user has taken if there is some type of problem.

The system adds the option to this screen if this is the first time the user has selected the option; otherwise, the system updates the Last run date and Last run time fields each time the user selects an option (instead of adding the option to the screen again).

How to display this screen: Select View History for a user at the Work with Users Screen.

Field	Description
User	The user ID and user name. The user ID is a code that identifies the user to the system. This code controls the user's access to menus, menu options, companies, features and user-defined functions. The user ID you enter must match the user's user control record ID. See Display User Option History Screen in the Administration Guide for more information. Alphanumeric, 10 positions; required.

Field	Description
Option	The fast path code for a menu option. The fast path code is a 4-position short name for an option. Alphanumeric, 4 positions; display-only.
Description	The description associated with the menu option, as defined in the Menu Options table. See Setting Up Menu Options (WOPT). Alphanumeric, 40 positions; display-only.
Last run date	The date on which the user last selected this option. Numeric, 6 positions (in user date format); display-only.
Last run time	The time of day at which the user last selected this option. Numeric, 6 positions (HHMMSS format); display-only.

Screen Option	Procedure
Submit a batch job that will purge the user option history for this user	Select Purge.

Work with User Tickler Group Screen

Purpose: Use this screen to assign a user to one or more tickler groups.

> **Note:**
>
> You should only assign users to tickler groups if you use workflow management; see Workflow Management Overview and Setup.

Tickler groups are groups of users that work with and resolve ticklers. You can define tickler groups using the Working with Tickler User Groups (WTUG) menu option.

To assign: Enter a tickler group in the Group ID field and select OK. The system assigns the user to the tickler group and displays the tickler group on the bottom half of the screen.

How to display this screen: Select Tickler Group for a user at the Work with Users Screen.

Field	Description
User	The user ID and description of the user assigned to one or more tickler groups. User ID: Alphanumeric, 10 positions; display-only. User description: Alphanumeric, 30 positions; display-only.

Field	Description
Group ID	A code for a group of users that work with ticklers. To assign: Enter a tickler group in this field and select OK. The system assigns the user to the tickler group and displays the tickler group on the bottom half of the screen. Tickler user groups are defined in and validated against the Tickler User Group table; see Working with Tickler User Groups (WTUG). Alphanumeric, 10 positions; optional.
Description	A description of the tickler user group. Alphanumeric, 40 positions; optional.

Screen Option	Procedure
Remove a tickler group from the user's tickler group assignment	Select Delete for a tickler group to remove the tickler group from the user's tickler group assignment.

Setting Up User Classes (WUCL)

Purpose: Use Work with User Classes to create user classes. You can control access to companies, menus options, secured features and user defined options for a group of individual users by assigning them to the same user class.

For example, you may want all of your order entry operators to have the same access to specific menu options, secured features or user defined functions. You can create a user class for them and permit or deny access to the same menu options, secured features or user defined functions instead of assigning authority on an individual user level.

Even if you assign the same level of security to a group of users, you can generally tailor an individual user's record to fit the specific user by selecting the Work with Users function. The exception to this is when you define access to vendor records; you cannot override vendor access for individual users.

> **Note:**
>
> Work with User Classes is a system-wide function; the information you work with in this function is the same regardless of which company you are currently working in.

In this topic:

- Work with User Classes Screen
- Create User Class Screen
- Work With Company Authority Screen
- Work With User Class Menu Option Authority Screen
- Work With User Class Feature Authority Screen

- Work With User Class/Vendor Authority Screen

For more information: To group users into user classes, you must also establish the individual user records; see the Administration guide

Work with User Classes Screen

Purpose: Use this screen to create, change, copy, delete and display a user class. After you have created a user class, you can also use this screen to assign authority to companies, menu options, secured features, alternate address formats, user-defined functions and vendors for this user class.

How to display this screen:

- select Work with User Classes from a menu.
- enter WUCL in the Fast path field at the top of any menu.
- select W/W User Classes at the Work with Users Screen.

Field	Description
Class	A user class is a grouping of users (for example, all Order Entry operators). You can assign authority to companies, menu options, etc. at the user class level. Alphanumeric, 10 positions; optional.
Description	A description of the user class. Alphanumeric, 30 positions; optional.

Screen Options	Procedure
Create a user class	Select Create to advance to the Create User Class Screen.
Change a user class	Select Change for a user class to advance to the Change User Class screen. See Create User Class Screen for a description of the fields on this screen. You can change any of the fields on this screen except the User class field.
Delete a user class	Select Delete for a user class to delete it.
Display a user class	Select Display for a user class to advance to the Display User Class screen. You cannot change any information on this screen. See Create User Class Screen for a description of the fields on this screen.
Assign company authority to a user class	Select Company Auth to advance to the Work With Company Authority Screen.
Assign menu option authority to a user class	Select Menu Option Auth to advance to the Work With User Class Menu Option Authority Screen.
Assign feature authority to a user class	Select Feature Auth to advance to the Work With User Class Feature Authority Screen.
Assign vendor authority to a user class	Select Vendor Auth to advance to the Work With User Class/Vendor Authority Screen.
Work with menus	Select Work with Menus to advance to the Work with Menus Screen.

Create User Class Screen

Purpose: Use this screen to define the user class and description and assign a default menu and company to this user class.
Once you have created a user class, you can assign authority to companies, menu options, secured features, alternate address formats, user-defined options and vendor authority for this user class.

How to display this screen: Select Create at the Work with User Classes Screen.

Field	Description
User class	A user class is a grouping of users (for example, all Order Entry operators). You can assign authority to companies, menu options, etc. at the user class level. Alphanumeric, 10 positions. Create screen: required. Change screen: display-only.
Description	The description of this user class. Alphanumeric, 30 positions; required.
Each of the following fields are default values that you can override for individual users:	
Output queue	Not currently implemented. Alphanumeric, 10 positions; optional.
Default menu	The name of the menu to appear when this user class enters Order Administration. Menu names are defined in and validated against the Menu table. See Customizing Menus (WMNU). Alphanumeric, 10 positions; optional.
Default company	This code identifies the company where the user class primarily works. Company codes are defined in and validated against the Company table. You must define a default company for a user class in order to define vendor authority for the class. Numeric, 3 positions; optional.
Modern View Quick Link Menu	The name of the menu to display in the quick link area at the bottom of the Home page in Modern View for users in this class. Which menu options? The menu you specify here should include menu options that are available in Modern View. Any menu options included in the selected menu that are not available in Modern View are not displayed at the Modern View Home page. Also, any sub-menus are not displayed. See Customizing Menus (WMNU) for more information.

Work With Company Authority Screen

Purpose: Use this screen to allow or exclude this user class from having access to companies defined on your system.

How to display this screen: At the Work with User Classes Screen, select Company Auth.

Field	Description
Comp (Company code)	The code for a company. Numeric, 3 positions; optional.
Description	The description of the company. Alphanumeric, 30 positions; optional.
Authorized	Indicates whether the user class has access to this company. Valid values are: • Yes = This user class has access to this company. • No (default) = This user class does not have access to this company.

To change: Move your cursor to the value in the Authorized field, change it as necessary, and select OK.

Work With User Class Menu Option Authority Screen

Purpose: Use this screen to assign or prohibit access to specific menu options for a user class. Specifying access to a specific menu option on this screen will override the Default authority in an individual user's record (this is the default authority that you assign, in Working with User Records (WUSR), on the Create User Screen, not the User Authority that you define for a specific menu option on the Work with Menu Option Authority Screen).

For example, if an individual user within this user class has the default authority Allow in their user record, specifying Exclude next to a menu option will prevent any user within this class from performing the menu option.

How to display this screen: Select Menu Option Auth for a user class at the Work with User Classes Screen

About authority: If an authority level has been previously assigned to a menu option for this user class, the level appears next to the menu option under the Authority field. If the authority level does not display, the system uses the default authority defined in each individual user's record to determine a user's access.

When you exclude a user class from a menu option, the user class can still access the same type of functionality through other menu options. For example, you might exclude a user class from the Create Item Warehouse/Locations (MIWL) option, but the user class will still be able to create an item warehouse or an item location through Work with Warehouses (WWHS) or Work with Items/SKUs (MITM).

Field	Description
Menu option	The fast path for the menu option. Alphanumeric, 4 positions; optional.
Description	The description of the menu option. Alphanumeric, 60 positions; optional.

Field	Description
User Authority	Enter an authority level to display menu options that match your entry. Valid values are: • Allow • Display • Exclude Optional.

To delete: Select Delete for the option. The screen refreshes itself and the authority level disappears.

This delete option affects authority for this user class only; it does not affect authority at the user record level.

Assign authority: There are three levels of authority you can assign to a menu option for this user class:

1. Display = Select Display for the menu option to limit this user class' access to inquiry only.
2. Allow = Select Allow for the menu option to allow this user class to perform this menu option.
3. Exclude = Select Exclude for the menu option to prohibit access to this user class.

The authority level you entered appears next to the menu option.

Work With User Class Feature Authority Screen

Purpose: Use this screen to override the default authority defined in the secured feature record (See Setting Up Secured Features), and assign or prohibit access to a secured feature for a user class.

Typically, a secured feature is a procedure or action that can be performed within a function. The ability to maintain batch totals and override prices in Order Entry are examples of secured features in the system.

A user class might have access to Order Entry or the Purchase Order functions. However, within those functions, you might not want to give all who have access the authority to certain features, which the system has segregated as secured features.

You can create or maintain secured features through the Work with System Values/ Features function. See Setting Up Secured Features

How to display this screen: Select Feature Auth for a user class at the Work with User Classes Screen.

About authority: If you have assigned an authority level for a secured feature to this user class, the level displays next to the feature, under the Authority field; otherwise, the system uses the authority defined in the secure feature record.

The system checks for authority in this order:

1. User authority. See Working with User Records (WUSR). If blank, the system checks
2. User class authority. If blank, the system uses

3. Default (company-wide) authority, as defined in the System Control table. See Setting Up Secured Features.

Field	Description
Appl area (Application area)	The application area where the secured feature belongs. Alphanumeric, 3 positions; optional.
Appl grp (Application group)	The application group where this secured feature belongs. Alphanumeric, 3 positions; optional.
Secure feature	The name of the secured feature. Alphanumeric, 60 positions; optional.
Authority	The authority level you assign to this feature for the user class. Valid authority levels are: • Allow • Display • Exclude Optional.

Delete authority: Select Delete for the feature. The screen refreshes itself and the authority level disappears.

Assign authority: There are two levels of authority you can assign to a secured feature for this user class:

1. Allow = Select Allow for the feature to allow this user class to perform this secured feature, unless otherwise prevented by menu option authority.
2. Exclude = Select Exclude for the feature to prevent this user class from using this secured feature.

The authority level you entered appears next to the secured feature.

Work With User Class/Vendor Authority Screen

Purpose: Use this screen to restrict a class of users from particular vendors when the users select certain menu options. This might be useful to you if you want to grant vendors limited remote access to your system as a user, so that you can be sure they have access only to relevant information. Vendor authority is defined at the user class level only; you cannot override vendor authority for individual users.

The default authority for each vendor is always set to **Allow**; you define a user class's vendor authority by selecting which vendors it does not have access to, and setting them to **Exclude**.

System control value: The system checks a user's vendor authority only if the Check User Class/Vendor Authority (D88) system control value is selected.

> **Note:**
>
> You must define a default company for the user class in order to use this feature, so that the system knows where to locate the vendors for access restriction.

Menu options affected by vendor authority restriction:

Menu Option

- Working with Existing Items (MITM)
- Using Inventory Inquiry (DINI)
- Purchase Order Inquiry (MPOI)
- Printing Purchase Orders (MPRP)
- Working with Vendors (WVEN)
- Working with Vendor Items (WVNI)
- Working with Inventory Transactions (WITI)

Types of restrictions:

- the vendor record
- any purchase orders for the vendor
- any items that are assigned to this vendor by having the vendor number defined in the Item table
- any vendor items defined for the vendor (but not necessarily the item itself).

Information relative to restricted vendors does not display when you scan in any of the menu options affected by vendor authority restriction. If you attempt to work with a restricted record directly -- for example, by entering a purchase order number associated with a restricted vendor -- the system displays an error message. These restrictions are in effect for the menu options listed in the table only. It is possible to work with vendor information through other menu options in Order Administration, if the user has the proper menu option authority. See the discussion of this option in Setting Up General Usage Values.

How to display this screen: Select Vendor Auth for a user class at the Change User Class screen.

Field	Description
Vendor#	A code that defines a vendor on your system. Vendor numbers are defined in and validated against the Vendor table. See Working with Vendors (WVEN). Numeric, 7 positions; optional.
Vendor name	The name of the vendor. Alphanumeric, 30 positions; optional.
Authority	The class's authority to the vendor. Valid values are: • Allow • Display • Exclude Enter Exclude to display vendors that the user class is restricted from working with. Optional.

To change:

1. Select Allow for each currently excluded vendor that you want to give the user class authority to work with.

2. Select Exclude for each currently allowed vendor that you want to restrict the user class from working with.
3. The system changes the authority status of the vendor or vendors and updates the screen with the new information.

Working with Threshold Values (WTHR)

Purpose: Use this menu option to create statistics, such as tracking the number of held purchase orders, for the system to monitor.

In this topic:

Threshold values indicate the numbers and/or dollar values that trigger the system to generate an email when these values are breached.

Determining when a threshold is breached: For each threshold you define, the system compares the actual number value and/or dollar value for the threshold against the thresholds you define; and generates a Threshold Monitor Breach email if the threshold is breached.

The Comparison for the threshold determines when the threshold is breached. If the comparison is:

- Greater than: the threshold is breached when the actual number or dollar amount exceeds the threshold number or dollar amount. For example, the threshold is breached if the actual number is 241 and the threshold number is 200 (241 is greater than the threshold of 200).
- Less than: the threshold is breached when the actual number or dollar amount is less than the threshold number or dollar amount. For example, the threshold is breached if the actual dollar is $100 and the threshold dollar is $500 ($100 is less than $500).

If you define both a threshold number value and a dollar value, the system checks both values to determine when the threshold is breached.

Example: One of the system-delivered thresholds is Backorders (BO). This threshold monitors the number of open and held orders that contain at least one unit on backorder, and monitors the merchandise dollars of units on backorder included on open or held orders. You can use this threshold to send an email to the warehouse supervisor when there are more than 100 open and held orders that contain at least one unit on backorder. To do so, define 100 as the threshold number with a greater than comparison (the actual value must be greater than the threshold value). Once the actual number of open and held orders containing a backordered item is 101, the system sends an email to the warehouse supervisor.

Threshold Code and Description	Comparison	Number Value	Actual Number	Email address
BO: Backorders	Greater than (actual value is greater than the threshold value)	100	101	a.user@example.com

Updating Threshold Actual Values

The System Delivered Thresholds are defined in the Threshold Value table.

The Batch Order Control job (ORD_CONTRL) updates the actual threshold values and compares the threshold number value and/or threshold dollar value against the actual units and/or dollars for each threshold to determine if a threshold has been breached.

This job also updates the values in the Order Control Summary table. You can review order and merchandising summary information using the Operations Control Summary menu option. This menu option provides a high-level overview of the fulfillment process, identifies potential bottlenecks or problem areas, and delivers an audit trail of order activity. See Reviewing Operations Control Summary (FLSH).

Submitting the Batch Order Control job: The system submits the Batch Order Control job when:

- you select Update current totals in the Operations Control Summary (FLSH) menu option; see Reviewing Operations Control Summary (FLSH).
- you submit a periodic process that:
  - includes the Order Summary (ORDSUM) periodic function (program name PFR0062), OR
  - includes the Threshold (THRESHD) periodic function (program name PFTHRESHMO).

> **Note:**
>
> You can schedule a periodic process to run at a specified time; see Executing Periodic Processes (EPRO) for more information on defining a job schedule for a periodic process.

Batch Order Control processing: The Batch Order Control job:

updates all of the related fields in the Order Control Summary table for the current transaction date. You can review operations and merchandising summary values through the Reviewing Operations Control Summary (FLSH) menu option.

- generates the Operations Control Report, which lists the most recent operations and merchandising summary totals. **Note:** The system generates the report only if you submit the Batch Order Control job from the Operations Control Summary menu option or from the ORDSUM periodic function.
- updates the actual value fields and Last updated fields in the Threshold Values table. The system updates the actual value field regardless of whether you have defined a threshold.

- determines if a threshold is breached by comparing the defined threshold number or dollar value against the actual number value and/or actual dollar value. If you have not defined a threshold value for a threshold, the system does not monitor the threshold for a breach.
- if a threshold has been breached, the system sends a Threshold Monitor Breach Email to the email address for the threshold. **Note:** The system generates an email only if you submit the Batch Order Control job from the THRESHD periodic function.

Threshold Monitor Breach Email

If a threshold is breached the system sends a Threshold Monitor Breach email to the email address for the threshold.

> **Note:**
>
> You can define just one email address for each threshold. See Email Address Validation for information on how the system verifies that your entry is formatted correctly.

Email hour interval: The system sends a threshold monitor breach email only when:

- you submit the Batch Order Control job (see Updating Threshold Actual Values for more information on how to submit this job), and
- the number of hours from the Email interval for the threshold has passed. The system compares the system date and system time to the Last sent on date field and Last sent on time for the threshold to determine whether to send another email, and continues to send an email based on the hourly interval until the threshold is no longer breached.

Sample email:

From: cwjava@example.com

To: a.user@example.com

Subject: **ALERT** Threshold Monitor Breach

Backorders threshold exceeded.

Review Backorder Reports.

Co#: 7 Actual$: 26973 > Thresh$: 13700

Use WTHR to monitor this breach.

Contents

- From: The from email address is set to no-reply@omni.retail.oraclecloud.com and cannot be changed. The system uses the From email alias, such as My Email Alias <no-reply@omni.retail.oraclecloud.com>, if one is specified for the company through Working with Companies (WCMP)
- To: The Email address for the breached threshold.
- Subject: `**ALERT** Threshold Monitor Breach`
- First data: Indicates which threshold has been breached, for example: `Backorders threshold exceeded.`
- Second data: The text from the Action field for the breached threshold.

- Third data: The company, actual threshold value, and threshold comparison value defined for the breached threshold, for example: `Co#: 7 Actual$: 26973 > Thresh$: 13700.`
- Final data: `Use WTHR to monitor this breach.`

System Delivered Thresholds

The table below describes the system-delivered thresholds and how the system updates the threshold actual values. If have not already created these thresholds, the Batch Order Control job automatically creates them; however, you still need to define the threshold criteria; see Updating Threshold Actual Values.

Code	Name	Threshold Description
BO	Backorders	Monitors the number of open and held orders that contain at least one unit on backorder, and the total merchandise dollar value of these backordered units. The system determines if an item is on backorder by calculating open quantity on order line - reserved quantity on order line = backorder quantity. The system determines the open quantity by calculating order quantity - shipped quantity - cancelled quantity - soldout quantity = open quantity. Actual number value The total number of open and held orders that contain at least one unit on backorder, including the total number of ship-to addresses for orders with multiple ship-tos. For example, an order with two ship-to addresses updates the number of orders total by 2. This is the sum of the Future use 1 number and Future use 2 number from the Order Control Summary table for the most recent transaction date. Actual dollar value The sum of the Open backordered dollars and the Held backordered dollars from the Order Control Summary table for the most recent transaction date.

Code	Name	Threshold Description
HP	Purchase Orders On Hold	Monitors the number of held purchase orders and the merchandise dollar value of items on these purchase orders. Held purchase orders are POs that are in a held (H) status; this does not include drop ship POs. The PO line status can be open (O) or held (H) to be included in these totals. Actual number value The Held PO number from the Order Control Summary table for the most recent transaction date. Actual dollar value The merchandise dollar total for held purchase orders from the PO Detail table, determined by subtracting the quantity received from the quantity ordered and multiplying by the PO price. This is the Held PO dollars from the Order Control Summary table for the most recent transaction date.
IB	Inventory On Backorder	Monitors the number of units on backorder that are on open or held orders and the total merchandise dollars of backordered units on these orders. Actual number value The sum of the Open quantity backordered and Held quantity backordered from the Order Control Summary table for the most recent transaction date. Actual dollar value The sum of the Open dollars backordered and the Held dollars backordered from the Order Control Summary table for the most recent transaction date.

Code	Name	Threshold Description
IP	Inventory Pending Putaway	Monitors the number of units received into a pending putaway warehouse and their merchandise dollar value. A pending putaway warehouse is a warehouse where you place inventory that is on its way to its final destination. You can define a warehouse as a pending putaway warehouse by assigning a warehouse location type of PP (pending putaway warehouse) to the warehouse in Working with Default Warehouse Locations (WWDL). The system increases these totals when you receive a PO line or a partial quantity on a PO line into a pending putaway warehouse. Actual number value The total number of units received into a pending putaway warehouse, from the Pending Putaway Detail table. This is the Pending putaway quantity from the Order Control Summary table for the most recent transaction date. Actual dollar value The merchandise dollar value of items received into a pending putaway warehouse, from the Pending Putaway Detail table. The system multiplies the quantity pending for each pending putaway detail record by the PO cost to determine the merchandise dollar value for each pending putaway detail record (if a PO cost is not defined, the system uses the SKU cost from the SKU table). The system then sums the merchandise dollars for each pending putaway detail record to determine the total pending putaway merchandise dollars. This is the Pending putaway dollars from the Order Control Summary table for the most recent transaction date.

Code	Name	Threshold Description
IS	Inventory In Staging Whs	Monitors the number of units received into a staging warehouse and the merchandise dollars value of these units. A staging warehouse is a warehouse that represents an area within your actual warehouse where you keep stock that needs to be put away. You can designate a warehouse as a staging warehouse by entering the warehouse code in the Default Staging Warehouse (E15) system control value. The system increases these totals when you receive a PO line or a partial quantity on a PO line into a staging warehouse. Actual number value The total number of units received into a staging warehouse. To determine the number of units received into staging, the system totals the on-hand quantity for each item warehouse record in the staging warehouse. This is the Staging inventory quantity from the Order Control Summary table for the most recent transaction date. Actual dollar value The merchandise dollar value of items received into a staging warehouse. To determine the merchandise dollars of items received into staging, the system multiplies the total on-hand quantity in the Item Warehouse table for the staging warehouse times the SKU cost. This is the Staging inventory dollars from the Order Control Summary table for the most recent transaction date.

Code	Name	Threshold Description
LP	LTD purchase dollars	Monitors the number of orders placed by a sold-to customer and their merchandise dollar value. The system monitors this threshold only when the sold-to customer places an order in order entry. If the Update Demand for Order Maintenance Transactions (C72) system control value is selected, the system increases a sold-to customer's LTD (life-to-date) orders number and dollars when you add an order line to an order in order maintenance. The system reduces a sold-to customer's LTD orders number and dollars when you cancel an order if the cancel reason you enter is set to update demand. **Note:** You must manually create this threshold value. Also, the threshold's actual number and actual value are not listed on the Work with Thresholds Screen since these values apply to a specific sold to customer. The system does not send an email when this threshold is breached; instead, a pop-up window opens in order entry. Customer Order History Window The Customer Order History Window opens in order entry when you enter an order for a customer whose LTD order dollars exceeds the threshold value. Actual number value The number of orders placed by a sold-to customer, not including any returns created through order entry or exchange items entered on an order. This is the Order number LTD in the Customer Sold To Order History table for the most recent transaction date. Actual dollar value The merchandise dollar value of the orders placed by a sold-to customer, including any backordered or soldout items, but not including any returns created through order entry. This is the Order dollars LTD from the Customer Sold To Order History table for the most recent transaction date.

Code	Name	Threshold Description
NP	Orders Rsvd/Not Printed	Monitors the number of reserved units on open and held orders and their total merchandise dollar value. Actual number value The sum of the Open unprinted quantity and Held unprinted quantity from the Order Control Summary table for the most recent transaction date. Actual dollar value The sum of the Open unprinted dollars and Held unprinted dollars from the Order Control Summary table for the most recent transaction date.
OH	Orders On Hold	Monitors the number of units on held orders and their total merchandise dollar value. This includes units regardless of whether they are on backorder or are printed, but does not include held order lines if the order itself is not held. Actual number value The sum of the Held backordered quantity, Held printed quantity, and Held Unprinted quantity from the Order Control Summary table for the most recent transaction date. Actual dollar value The sum of the Held backordered dollars, Held printed dollars, and Held unprinted dollars from the Order Control Summary table for the most recent transaction date.
OR	Pending Refund	Monitors the number of pending refunds and their total merchandise dollar value. Pending refunds are refunds in an open or held status that have not yet been processed; these totals do not include refunds that are in a pending cancelled, cancelled, pending write off, write off, or processed status. Actual number value The Refunds pending number from the Order Control Summary table for the most recent transaction date. Actual dollar value The Refunds pending dollars from the Order Control Summary table for the most recent transaction date.

Code	Name	Threshold Description
PC	Pending RA Credit	Monitors the number of pending return authorization credits and their total merchandise dollar value. Pending return authorization credits are return authorizations that have been received, but not yet credited. These totals include the returned units on return and exchange transactions, but not items ordered in exchange. Actual number value The total number of pending return authorization credits, regardless of whether the returns are on the same order. For example, an order with 2 pending RA credit order lines processed separately updates this total by 2; however, if the same 2 pending RA credit order lines on a single order are processed in the same transaction, the total updates by 1. The system determines the number of pending RA credits by totaling the number of RA header records whose date received is greater than 0 and date credited is 0. This is the Pending RA credit number from the Order Control Summary table for the most recent transaction date. Actual dollar value The merchandise dollar total of items on pending return authorization credits, determined by multiplying the uncredited quantity by the order detail price. From the Pending RA credit dollars in the Order Control Summary table for the most recent transaction date.

Code	Name	Threshold Description
PD	Purchase Orders Past Due	Monitors the number of purchase orders that contain purchase order lines that are past due their merchandise dollar value. This does not include drop ship purchase orders. Past due purchase orders contain PO lines that have not yet been received and are past the expected due date (the Due date on the PO line is earlier than the current date). PO lines whose status is open (O) or held (H) are included in these totals. Actual number value The total number of open, held, and docked POs that include PO lines that are past due. This is the sum of the Open past due PO number, Held past due PO number, and Docked past due PO number from the Order Control Summary table for the most recent transaction date. Actual dollar value The merchandise dollar total for items on open, held, and docked POs that are past due. This is the sum of the Open past due PO dollars, Held past due PO dollars, and Docked past due PO dollars from the Order Control Summary table for the most recent transaction date.
PK	Purchase Orders Docked	Monitors the number of docked purchase orders and their merchandise dollar value. Docked purchase orders are POs that are in a docked (D) status. PO lines on partially docked PO's whose status is (O) or held (H) are included in these totals. If you partially receive a docked PO, the system updates the PO status from docked (D) to open (O). Actual number value The Docked PO number from the Order Control Summary table for the most recent transaction date. Actual dollar value The merchandise dollar total for docked purchase orders from the PO Detail table, determined by subtracting the quantity received from the quantity ordered and then multiplying by the PO price. This is the Docked PO dollars from the Order Control Summary table for the most recent transaction date.

Code	Name	Threshold Description
PO	Pending Pick Slips	Monitors the number of pending pick slips and their merchandise dollar value. Pending pick slips are pick slips that have not yet been billed, but does not include pick slips that are voided, waiting for authorization, or suspended. The system increases the pending pick slip number, units, and dollars for drop ship orders if the drop ship output defined for the vendor is drop ship pick slip; if the drop ship output defined for the vendor is drop ship purchase order or collaborative shipping, the system increases the total units and total dollars pending, but does not increase the total number pending. Actual number value The Pending picks number from the Order Control Summary table for the most recent transaction date. Actual dollar value The Open printed dollars and Held printed dollars from the Order Control Summary table for the most recent transaction date.
RA	Pending RA Receipt	Monitors the number of pending return authorization receipts and their merchandise dollar value. Pending return authorization receipts are return authorizations that have been entered, but not yet received. These totals include items returned on return and exchange transactions, not items ordered in exchange. Actual number value The total number of pending RA receipts, regardless of whether the returns are on the same order. For example, an order with 2 pending RA receipt order lines processed separately updates this total by 2; however, if the same 2 pending RA receipt order lines on a single order are processed in the same transaction, the total updates by 1.

Code	Name	Threshold Description
		The system determines the number of pending RA receipts by totaling the number of RA header records whose date received is 0. This is the Pending RA receipt number from the Order Control Summary table for the most recent transaction date. Actual dollar value The merchandise dollar total of items on pending return authorization receipts, determined by multiplying the unreceived quantity by the order detail price. This is the Pending RA receipt dollars from the Order Control Summary table for the most recent transaction date.
RS	Suspended PO Receipts	Monitors the number of PO lines received into suspense and their merchandise dollar value. Actual number value The total number of PO lines received into suspense, including PO lines that have a partial quantity received into suspense. This is the Suspense receipts number from the Order Control Summary table for the most recent transaction date. Actual dollar value The Suspense receipts dollars from the Order Control Summary table for the most recent transaction date.
SB	Suspended Batches	Monitors the total number of order batches that are in a suspended status. The system does not monitor a threshold dollar value for suspended batches. Actual number value The system determines the number of order batches in a suspended status by totaling the number of orders in the Order Batch table whose Batch suspended field is set to Y. This is the Batches suspended number from the Order Control Summary table for the most recent transaction date.
SI	Suspended Inventory	Monitors the number of units received into suspense and their merchandise dollar value. Actual number value The Suspense receipts quantity from the Order Control Summary table for the most recent transaction date. Actual dollar value The Suspense receipts dollars from the Order Control Summary table for the most recent transaction date.

Code	Name	Threshold Description
SO	Suspended Orders	Monitors the number of suspended orders and their merchandise dollar value, regardless of whether the order is batched. Actual number value The total number of suspended orders, from the number of orders in a suspended status or error status in the Order Header table. This is the Orders suspended number in the Order Control Summary table for the most recent transaction date. Actual dollar value The merchandise dollar total of suspended orders, including orders in a suspended or error status. This is the sum of the merchandise dollars for suspended and orders in error in the Order Ship To table. This is the Orders suspended dollars from the Order Control Summary table for the most recent transaction date.
VC	Virtual Card Numbers	Monitors the number of stored value card numbers available to assign to a virtual stored value card. Actual number value The actual number of records in the Virtual Card Number Table (FLSVCA).

Work with Thresholds Screen

Purpose: Use this screen to review, create, change, or submit a command to process a threshold value.

How to display this screen: Enter WTHR in the Fast path field at the top of a menu or select Work with Threshold Values from a menu.

Field	Description
Description	A description of the threshold. See System Delivered Thresholds for a listing of system-delivered threshold values and the calculations performed. Alphanumeric, 30 positions; optional.
Threshold units	The number defined for the threshold. Numeric, 7 positions; display-only.
Threshold value	The dollar amount defined for the threshold. **Note:** You can enter a whole dollar amount, but no decimals. Numeric, 7 positions; display-only.

Field	Description
	Breached values are highlighted in red: A threshold's Actual units or Actual value, or both, are highlighted in red if they have breached the corresponding thresholds. The system considers a threshold breached if you have specified a Comparison setting for the threshold and either of the actual values is beyond the threshold, even if the threshold is zero. To avoid having a threshold flagged as breached, set the Comparison to unselected (blank).
Actual units	The actual current value for the threshold, such as the actual number of units on backorder. Numeric, 7 positions; display-only.
Actual value	The actual dollar amount for the threshold, such as the dollar value of units on backorder. **Note:** The system rounds the actual dollar amount down to the nearest whole dollar. Numeric, 7 positions; display-only.
Action	The message to include in the Threshold Monitor Breach Email to indicate the action to take if the threshold is breached; for example, if the OH (Orders on Hold) threshold is breached, the action may be GENERATE THE HELD ORDERS REPORT. Alphanumeric, 50 positions; display-only.

Screen Option	Procedure
Create a threshold	Select Create to advance to the Create Threshold Values Screen.
Change a threshold	Select Change next to a value to advance to the Change Threshold Values screen. At this screen you can change all fields except the Last update date and time, Threshold code, Actual unit value, Actual dollar value, and Last sent date and time. See Create Threshold Values Screen for field descriptions.
Delete a threshold	Select Delete next to a value to delete it.
Display a threshold	Select Display next to a value to advance to the Display Threshold Values screen. You cannot change any information on this screen. See Create Threshold Values Screen for field descriptions.
Show all thresholds or only breached thresholds	Select Show All/Breached. The system toggles between displaying all thresholds or only those thresholds that have been breached. **When is a threshold considered breached?** The system considers a threshold breached if you have specified a Comparison setting for the threshold and either of the actual values is beyond the threshold, even if the threshold is zero. To avoid having a threshold flagged as breached, set the Comparison to unselected (blank).

Create Threshold Values Screen

Purpose: Use this screen to create a threshold.

How to display this screen: Select Create at the Work with Thresholds Screen.

Field	Description
Threshold	The code and description that represents a threshold. See System Delivered Thresholds for a list of system-delivered thresholds. Threshold code: Alphanumeric 2 positions. Create screen: required. Change screen: display-only. Threshold description: Alphanumeric, 30 positions; required.
Last update	The date and time when the threshold was last updated. Date: Alphanumeric, 6 positions; display-only. Time: Alphanumeric, 6 positions; display-only.
Comparison	Defines how the system determines whether the threshold is breached. Valid values: • Greater than = The threshold is breached when the actual system value exceeds the threshold value. • Less than = The threshold is breached when the actual system value is less than the threshold value. **Note:** Leave this field blank (unselected) if you do not want the system to check whether the threshold is breached. Optional.
Value	The number that represents the threshold value. Numeric, 7 positions; optional.
$ Value	The dollar amount the represents the threshold value. **Note:** You can only enter a whole dollar amount. Numeric, 13 positions with a 2-place decimal; optional.
Actual value	The actual number for this threshold, updated by the system. Example: The actual number of units on backorder. Numeric, 7 positions; display-only.
$ actual value	The actual dollar amount for this threshold, updated by the system. Example: The dollar value of units on backorder. **Note:** The system rounds the actual dollar amount down to the nearest whole dollar. Numeric, 20 positions with a 2-place decimal; display-only.
Email address	The email address where the system delivers the Threshold Monitor Breach Email when the threshold is breached. **Note:** You can define just one email address for each threshold. See Email Address Validation for information on how the system verifies that your entry is formatted correctly. Alphanumeric, 50 positions; optional.
Email interval	The number of hours the system waits before sending another email for the breached threshold. Numeric, 3 positions; optional.
Last sent on/at	The last date and time when an email was sent for the threshold. Date: numeric, 6 positions (in user date format); display-only. Time: numeric, 6 positions (HHMMSS format); display-only.

Field	Description
Action	The message to include in the Threshold Monitor Breach Email, indicating the action to take if the threshold has been breached; for example, if the OH (Orders on Hold) threshold is breached, the action may be GENERATE THE HELD ORDERS REPORT. Alphanumeric, 50 positions; optional.
Code	A code for the application area associated with the threshold. Alphanumeric, 3 positions; required.
Group code	A code for the application group associated with the threshold. Alphanumeric, 3 positions; required.

Using the Menu Driver

Topics in this part: The following topics describe how to create and customize menus for individual or groups of users.

- Menu Driver Screen describes the features and functions of the Menu Driver.
- Setting Up Menu Options (WOPT) describes how to create and change menu options and their descriptions.
- Customizing Menus (WMNU) describes how to create and change menus, copy menus, and define menu details.
- Setting Up Application Areas describes how to create and change application areas and their descriptions.
- Setting Up Application Groups describes how to create and change application groups and their descriptions.
- Working with Announcements (WANN) describes how to set up the announcements to display on the home menu.

> **Note:**
>
> This part assumes that the individual performing the tasks described here has the appropriate security and authority to access all features and functions. For information on system and application security and authority setup, see Establishing Security.

The Menu Driver checks the initial security code provided by Order Management System at the time of installation. If a mismatch is found, the Menu Driver does not allow access to the software.

Setting Up Menu Options (WOPT)

Purpose: Use this screen to create a menu option and define its attributes.

In this topic:

- Create Menu Options Screen

Related sections: To create and tailor your own menus, see Customizing Menus (WMNU).

Work with Menu Options Screen

How to display this screen: Enter WOPT in the Fast path field at the top of a menu or select Work with Menu Options from a menu.

Field	Description
Option	The Fast Path name for a menu option. Alphanumeric, 4 positions; optional.
Description	The description of the menu option. Alphanumeric, 60 positions; optional.
Type	The menu option type. Valid types include: • Modern View: The option is available only in Modern View, including Contact Center options. Modern View options are not displayed in Classic View if they are included in a menu, and you cannot advance to them by entering the fast path. • Program: The option is available in Order Administration (Classic View). Also, certain programs are also available in Modern View, including OIOM, DBJS, MULO, ERHO, and MSVB. A Modern View Option flag in the Menu Option table controls whether a program option is also available in Modern View. • Process: The option initiates a process, such as running a periodic function. Optional.
Appl Area (Application Area)	The application area to which this menu option belongs. Application areas are defined in Setting Up Application Areas(WSYS). Alphanumeric, 3 positions; optional.
Appl Group (Application Group)	Allows you to enter the application group to which this menu option relates. Application groups are defined in Setting Up Application Groups(WSYS). Alphanumeric, 3 positions; optional.

Screen Option	Procedure
Create a menu option	Select Create to advance to the Create Menu Options Screen.
Change a menu option	Select Change to advance to the Change Menu Options screen. See Create Menu Options Screen for field descriptions. **Note:** The System Option field does not appear on the Change screen.
Delete a menu option	Select Delete to delete a menu option. **Note:** You cannot delete menu options that were delivered with the system and that exist on a menu, or if you do not have the authority required to perform this action.

Screen Option	Procedure
Display a menu option	Select Display to advance to the Display Menu Option screen. You cannot change any fields on this screen See Create Menu Options Screen for field descriptions. **Note:** The System Option field does not appear on the Display screen.
Display menu names on which an option appears	Select Usage to advance to a pop-up window that lists the menus that include this option.

Create Menu Options Screen

Purpose: Use this screen to create a menu option.

How to display this screen: Select Create at the Work with Menu Options Screen.

Field	Description
Option	The Fast Path name for this menu option. Each option on the system has a unique name, allowing you to access an option directly without selecting the option from a menu tree. Alphanumeric, 4 positions; required.
Description	The menu option's description to display on a menu in Order Administration (Classic View). The description you enter is used to find the option quickly when you enter it in the Description field to scan for a menu option. Alphanumeric, 60 positions; required.
Modern View Description	The menu option’s description to display in Modern View, both in the menu and at the tab when the option is open. Used only for Modern View options. If this field is blank, the Description is displayed in Modern View. **Note:** This description is not used as the page title in Modern View; also, it is displayed in Modern View only when the option is included in a menu for the user. Alphanumeric, 60 positions; optional.
Type	The code that indicates if the option represents a command, program, or processing function, and whether it is available in Modern View only. • Modern View: The option is available only in Modern View, including Contact Center options. This type should not be assigned to options that need to be available in Classic View. Modern View options are not displayed in Classic View if they are included in a menu, and you cannot advance to them by entering the fast path. • Program: The option is available in Order Administration (Classic View). Also, certain programs are also available in Modern View, including OIOM, DBJS, MULO, ERHO, and MSVB. A Modern View Option flag in the Menu Option table controls whether a program option is also available in Modern View. • Process: The option initiates a process, such as running a periodic function. Required.

Field	Description
Program Name	If you selected Program in the previous Type field, you must enter the program name. When this option is selected from a menu, it will initiate a program. Example: INR0029 This program will initiate the Inventory Inquiry program. Alphanumeric, 10 positions; required if you selected a Type of Program.
Process Name	If you selected Process in the previous Type field, you must enter the processing function name. When this option is selected from a menu, it will initiate a process that runs on a scheduled basis. Example: PROCESS#2 This process will initiate Daily Reports Processing. See Working with Periodic Processes (WPPR) for information on working with processes. Alphanumeric, 10 positions; required if you selected a Type of Process.
Authority Parameter	If this menu option is a program, this setting indicates whether the user's authority should be passed into the program. The Menu Driver passes the user's authority to the program. See Work with Menu Option Authority Screen. • Selected = Authority checking will be performed to ensure that this user has access to the program. • Unselected = All users will have access to this program.
Company Parameter	Indicates whether the company number is passed into the program. Company numbers are defined in Working with Companies (WCMP). • Selected = The company number is passed into the program. • Unselected = The company number is not passed into the program.
System Option	Indicates if this menu option is a system option. System options can either be supplied with the system, or when you create a menu option, you can define it as a system option. As with system-supplied options, once you define an option as a system option, you cannot delete or change it. • Selected = System menu option. You cannot delete or change this menu option once it has been defined as selected. • Unselected = This option is not a system option and can be deleted or changed. However, menu options that are supplied with the system cannot be deleted or changed. Only options that you create can be defined as unselected (not a system option).

Field	Description
Appl Area (Application Area)	The application area (for example, Order Entry) to which this option belongs. This designation can be used to group similar options. For example, Purchase Order Inquiry, Purchase Order Purge, Purchase Order Print are assigned to the application area P/O, as these are all Purchase Order options. For options that are supplied with the system or that you define as a system option, you cannot change the application area. Application area can be used as a Fast Path method of sorting options on a menu. Application Areas are discussed in Setting Up Application Areas. Alphanumeric, 3 positions; required.
Appl Group (Application Group)	The application group (for example, freight) related to this option. This designation can be used to group similar options. For example, Work With Dollar Chart by Offer and Work With Dollar Chart by Source can be assigned to the application group FRE, as these are menu options that define how freight is calculated by the system. Application groups can be used as a Fast Path method of sorting options on a menu. Application Groups are discussed in Setting Up Application Groups. Alphanumeric, 3 positions; required.

Customizing Menus (WMNU)

Purpose: Use Work with Menus to create and customize menus for an individual user or groups of users in either Order Administration (Classic View), Modern View, or both. For example, you might want to create a menu and customize it so that only customer service functions appear to the individual who performs customer service activities.

Menus can include sub-menus: You can create menus that include only individual menu options, and also create menus that include sub-menus that provide additional menu options. The system does not prevent you from assigning the same menu option at different levels in the menu hierarchy, such as including an option at the top level menu and again in a sub-menu.

Menu option assignment for Modern View: In Modern View, for the most part a user's access to menu options is available through the Tasks option or the Pin the Menu option, and is based on the user's Default menu assignment in Work with Users; there is no Fast Path available in Modern View. However, if the user has authority to an menu option not included in their default menu or one of its sub-menus, the option is available in Modern View through a menu title of Additional Options.

Example: If a user is assigned authority to the MULO (unlock suspended order or batch) menu option, but the user's default menu does not include MULO, or include a sub-menu that includes MULO, the MULO option in Modern View is available under the menu title of Additional Options.

Quick link menu: You can assign a menu as the Modern View Quick Link Menu for a user class. The menu options included in this menu are displayed automatically for users in the user class at the Modern View Home page, provided that the options are available in Modern View.

Classic View or Modern View? Some menu options are available only in Classic View, some are available only in Modern View, and some are available in both:

- Modern View only: Options that are available only in Modern View have a Type of MODERN VIEW in Setting Up Menu Options (WOPT). If you are using Classic View and select an option available only in Modern View, the screen displays an error.
- Classic View only: Certain menu options are available only in Classic View. Any options that are available only in Classic View are not displayed in Modern View through the user's Default menu or its sub-menus.
- Both Modern View and Classic View: Certain menu options are available in both Modern View and Classic View. These options, which have a Type of PROGRAM or PROCESS, are:
  - Order Inquiry/Maintenance (OIOM)
  - Stored Value Card Balance Inquiry (MSVB)
  - Unlock Stranded Order or Batch (MULO)
  - Display Order Control Summary (FLSH)
  - Sales Summary (DSSS)

In this topic:

- Work with Menus Screen
- Work with Menu Details Screen (Creating a Menu and Menu Details)
- Copy Menu Screen
- Work with Menu Details Screen (Changing Menu Details)

Related topics: If you plan on creating your own menu options, read Setting Up Menu Options (WOPT) before you begin working with menus. Menu options must exist before you can add them to a menu, whether you are creating a menu or customizing a standard menu.

Work with Menus Screen

How to display this screen:

- Enter WMNU in the Fast path field at the top of a menu or select Work with Menus from a menu.
- Select Work with Menus on the Work with User Classes Screen.

Field	Description
Menu	The name of the menu. Alphanumeric, 10 positions; optional.
Description	The menu description. Alphanumeric, 60 positions; optional.

Screen Options	Procedure
Create a menu	Select Create to a advance to the Work with Menu Details Screen (Creating a Menu and Menu Details).

Screen Options	Procedure
Change a menu description	Select Change for a menu to advance to the Change Menu screen. This screen only allows you to change a menu's description. See Work with Menu Details Screen (Creating a Menu and Menu Details) for a description of the fields on this screen. **Note:** To change a menu's details, see Work with Menu Details Screen (Changing Menu Details).
Copy a menu to create a new menu	Select Copy for a menu to advance to the Copy Menu Screen.
Delete a menu	Select Delete for a menu to delete it.
Work with menu details	Select Menu Details for a menu to advance to the Work with Menu Details Screen (Changing Menu Details). This screen shows the specific menu option, its description, option type, and authority level.
Print menu details	Select Print Details for a menu to print the menu details.
Display menu names on which a menu appears	Select Usage for a menu to advance to the Sub-Menu Usage window.

Work with Menu Details Screen (Creating a Menu and Menu Details)

Purpose: Use this screen to create a menu and menu details.

> **Note:**
>
> Include no more than 13 menu options in a menu, as this is the maximum number of menu options that fit in the Quick Find Options area of the Menu Driver Screen at one time.

Modern View options: Menu options with a Type of Modern View are not available in Order Administration Classic View. These options are available in Modern View only.

How to display this screen: Select Create on the Work with Menus Screen.

Field	Description
Menu	The name for this menu that will be used to display and scan for a menu. The name you assign is used to display the menu when you enter it in the Menu field at the top of any menu. Alphanumeric, 10 characters; required.
Description	The description you assign to the menu. The description is used to scan for the menu when you enter it in the Description field at a prompt screen. This description also displays at the top of the menu. Alphanumeric, 60 characters; required.

Field	Description
Position	Indicates in what order the option will appear on the menu. Example: If you assign 001 to a menu option, this option will appear first on the menu, 002 will appear second, 003 will appear third, etc. **Note:** Include no more than 13 menu options in a menu, as this is the maximum number of menu options that fit in the Quick Find Options area of the Menu Driver Screen at one time. Numeric, 3 position; required.
L/H Text (Left-hand text)	Allows you to categorize a group of options on a menu. This text appears on the left side of the menu. Example: If you are adding four maintenance options and three inquiry options to a menu, you could add the label Maintenance to identify the maintenance options and *Inquiry* to identify the inquiry options. Alphanumeric, 10 positions; optional. Complete either the **Option or Menu field; do not complete both fields on the same line.**
Option	Enter the Fast Path name for this menu option that will display on the menu. Each option on the system has a unique name, which allows you to access an option directly without selecting the option from a menu tree. You must enter an existing menu option name. See Setting Up Menu Options (WOPT). **Note:** Modern View menu options are not available in Order Administration Classic View, and should not be assigned to Order Administration Classic View menus. These options are available in Modern View only. Alphanumeric, 4 positions; required unless you enter a value in the Menu field.
Menu	Enter the name of the menu that will appear as an option on the menu you are creating. Each menu on the system has a unique name, allowing you to access a menu directly without selecting the menu from a menu tree. The menu you enter is validated against the Menu table. See Setting Up Menu Options (WOPT). Alphanumeric, 10 positions; required unless you enter a value in the Option field.

Screen Option	Procedure
Review all existing menu options	Select W/W Menu Options to advance to the Work with Menu Options Screen.

Screen Option	Procedure
Resequence the menu options on the screen	Select Resequence to expand the lengths of the options' current Positions, making it easier to insert a new menu option between two existing options. A zero is added to the end of the Position for each existing menu option, provided that the current Position is 2 positions long or fewer. Example: If the current Position is 2, it is resequenced to 20, and if the current Position is 20, it is resequenced to 200. If the Position is 200, the Resequence option does not change it.
Delete the menu details	Select Delete.

Copy Menu Screen

Purpose: Use this screen to create a menu by copying an existing menu. The new menu will have the same menu options as the menu you copied. You cannot copy a menu to another existing menu.

How to display this screen: Select Copy Menu for a menu at the Work with Menus Screen.

Field	Description
From menu	The existing menu that you are copying. Alphanumeric, 10 positions; display-only.
Description	The description of the menu you are copying. Alphanumeric, 60 characters; display-only.
To menu	The name of the new menu you want to create. This menu name must be unique; it cannot already exist on the system. Alphanumeric, 10 positions; required.
Description	The description of this menu. Alphanumeric, 60 positions; required.

Work with Menu Details Screen (Changing Menu Details)

To change: Select Menu Details for a menu at the Work with Menus Screen to advance to the Work with Menu Details screen. See Work with Menu Details Screen (Creating a Menu and Menu Details) for a description of the fields on this screen.

To add a menu option: To add an option without changing the order of the menu options, enter the menu option you want to add on the next available open line.

To add an option to the menu in between two menu options (such as adding an option between 003 and 004), select Resequence to resequence the menu options. The system automatically assigns each option a value of ten. (For example, 001 becomes 10, 002 becomes 20, etc.)

Position your cursor at the next available line. Add the option by assigning a value between 1 and 9. For example, to add an option between 4 and 5, enter a value between 41 and 49 in the POS field. When you select OK, the menu options will appear in numerical order, as they will appear on the completed menu.

When you have finished adding options, select OK to validate your entries.

> **Note:**
>
> Include no more than 13 menu options in a menu, as this is the maximum number of menu options that fit in the Quick Find Options area of the Menu Driver Screen at one time.

Modern View options: Menu options with a Type of Modern View are not available in Order Administration Classic View, and should not be assigned to Order Administration Classic View menus. These options are available in Modern View only, and include:

- Contact Center Order Entry (CCOE)
- Display Batch Job Statistics (DBJS)
- Enterprise Data Import History (EDIH)
- Manage External Application Access (MEAA)
- Narvar Order Export Errors (NOEE)
- Payment Configurations (WPMT)

Working with Announcements (WANN)

Purpose: Use this option to enter or change the announcements displayed at the menu screen, as well as the Home page in Modern View.

Change Announcements Screen

How to display this screen: Enter WANN in the Fast Path field at the top of any menu, or select Work with Announcements from a menu.

Completing this screen: Enter the announcements to display at the Classic View menu screen when the user logs into Order Management System. You can enter up to three lines of up to 50 positions each.Your entry(ies) are displayed at the Classic View menu screen or the Modern View Home page the next time a user advances to a Classic View menu screen or the Modern View Home page.
Line breaks: The menu screen in Classic View Order Management System retains the line breaks when displaying the announcements; however, the Home page in Modern View concatenates the lines into a single flow.

For more information: See Menu Driver Screen.

> **Important:**
>
> The menu screen might not display the full 50 positions entered, depending on the width of the individual characters. It is important to test your entry to confirm that the menu screen displays it correctly

System Control Values and Number Assignments

Topics in this part:

- System Control Table Components provides an overview of the System Control table and describes how to set up and change values in this table.
- Setting Up Order Entry Values provides a definition of each Order Entry system control value.
- Setting Up Inventory Values provides a definition of each Inventory system control value.
- Setting Up Fulfillment Values provides a definition of each Fulfillment system control value.
- Setting Up General Usage Values provides a definition of each system control value in the General Usage application area.
- Setting Up Purchase Order Values provides a definition of each Purchase Order system control value.
- Setting Up Customer Service Values provides a definition of each system control value in the Customer Service application area. These values control parameters that include credit card authorization and return transactions.
- Setting Up the Number Assignment Table (WNUM) provides an overview of the Number Assignment table and describes how to set up and change number assignments in this table.
- Setting Up E-Commerce Values provides a definition of each e-commerce system control value.
- Setting Up Interface Values provides a definition of each Interface system control value.

Setting Up the Number Assignment Table (WNUM)

Purpose: Use the Number Assignment table to establish the starting and ending number assignments used throughout the system for fields that require a unique identifier, such as an order number, purchase order number and customer number.

The system will automatically and sequentially assign the next number for each record defined in this table. Typically, this table is pre-loaded by . If, however, the Number Assignment table is empty, you must define each number assignment during system set up. See Available Number Assignments for a description of each number assignment

In this topic:

- Work with Number Assignment Screen
- Available Number Assignments
- Create Number Assignment Screen
- Copy Company Info Window (Copying a Number Assignment)
- Change Number Assignment Screen

Work with Number Assignment Screen

Purpose: Use this screen to change, copy, delete, or display a number assignment field.

How to display this screen: Enter WNUM in the Fast path field at the top of any menu or select Work with Number Assignment from a menu.

Field	Description
File code	A code to uniquely identify a number assignment. Alphanumeric, 3 positions; optional.
Description	The description of the number assignment. Alphanumeric, 40 positions; display-only.
Last #	The number most recently assigned for the number assignment. Numeric, 9 positions; optional.
Start #	The initial number for the number assignment. Numeric, 9 positions; optional.
End #	The highest possible number that can be used for a number assignment. The value in the Last # field rolls (begins at the value in the Start # field again) when it reaches the value in the End # field. Numeric, 9 positions; optional.
Reset date	The date on which you changed the value in the *Last #* field manually. Numeric, 6 positions (in user date format); optional.

Screen Options	Procedure
Change a number assignment	Select Change for a number assignment to advance to the Change Number Assignment Screen.
Copy a number assignment	Select Copy for a number assignment to advance to the Copy Company Info Window (Copying a Number Assignment).
Delete a number assignment	Select Delete for a number assignment to delete it. The screen displays a message if you try to delete a system supplied number: System supplied number file codes cannot be deleted.
Display a number assignment	Select Display for a number assignment to advance to the Display Number Assignment Screen.
Create a number assignment	Select Create advance to the Create Number Assignment Screen

Available Number Assignments

Purpose: This chart lists and describes all of the number assignment records that should be included in your system. If the number assignment table is empty when you install the system, you must define each number assignment during system installation.

Although 9 positions are available for the Start # and End # fields, actual field lengths vary. For example, the number assignment A01 (Order Batch) is a 5-digit field; therefore, the numbers in the Start # and End # fields cannot exceed 5 digits. Refer to this table for exact field lengths for each number assignment.

Code	Number Assignment	Description	Field name/length
A01	Order Batch	Assigns the next number when entering a new batch of mail orders during Order Entry.	OBA Batch # Numeric, 5 positions
A04	Purchase Order Header	Assigns the next number to a purchase order for merchandise.	POH PO # Numeric, 7 positions
A05	Order Header	Assigns the next number to uniquely identify a new customer order or quote.	OHD Order # Numeric, 8 positions
A06	P/O Receipt Control	Assigns the next number when receiving merchandise ordered on several purchase orders to distribute costs across all goods received.	POC Control # Numeric, 7 positions
A07	Customer Sold To	Assigns the next number to uniquely identify the customer who places an order or wants a catalog.	CST Customer # Numeric, 9 positions
A09	Suspense Placement Work	Assigns the next number to incoming inventory being held in suspense.	SPW Job # Numeric, 6 positions
A10	Customer Fraud	Assigns the next number to uniquely identify a fraudulent name and address.	CFF Seq # Numeric, 7 positions
A11	Customer Bill To	Assigns the next number to a bill to customer.	CBT Account # Numeric, 7 positions
A12	Short SKU	Assigns the next number to an item or SKU so that you can uniquely identify it when passing e-commerce information or when picking and packing it (the number is printed with a product's bar code on the pick slip).	SKU Short SKU Numeric, 7 positions
A13	PCH Billing Batch #	Assigns the next number to a batch of pick slips so that you may bill all pick slips in the batch in a single step.	PCH Billing Batch # Numeric, 7 positions
A14	Pick Slip Gen Opts #	Assigns a number to a pick slip generation procedure, such as one that generates pick slips by customer number.	PSO Seq # Numeric, 5 positions
A15	PCH Control #	Assigns the next number to uniquely identify each pick.	PCH Control # Numeric, 7 positions
A16	Billing Invoice #	Assigns the next number to an invoice which uniquely identifies a shipment.	IHD Invoice # Numeric, 7 positions
A17	RA Header #	Assigns the next number to a pre-authorized return.	RAH RA# Numeric, 3 positions
A18	Refund Check #	This number assignment is no longer implemented; the system uses the refund check number specified in the Bank table instead.	RRC Check # Numeric, 7 positions

Code	Number Assignment	Description	Field name/length
A21	Authorization Record		
A25	Call Tag #	Not currently implemented.	CTG Call Tag # Numeric, 7 positions
A26	Cart Batch #	Assigns the next number to a cart to be used for cart/bin picking.	PDL Cart Batch # Numeric, 3 positions
A27	Order Cross Reference	Assigns the next order number equivalent to an order number from another system.	OCR Cross Reference # Numeric, 9 positions
A28	Invoice Cross Reference	Assigns the next invoice number equivalent to an invoice number from another system.	ICR Cross Reference # Numeric, 9 positions
A29	Barcode Counter	Assigns the next barcode number that will print on the shipping label. This counter is used by TanData when you ship a miscellaneous package (not a order). This enables you to wand the barcode on the package and add it to the manifest.	(No field defined in Order Administration) Numeric, 9 positions
A30	Amex Deposit File Sequence #	Assigns the next sequence number to uniquely identify a deposit table transmitted to the American Express credit card authorization service	(No field defined in Order Administration) Numeric, 6 positions
A31	NaBanco Batch #	Assigns the next batch number to uniquely identify a deposit table transmitted to the NaBanco credit card authorization service	(No field defined in Order Administration) Numeric, 3 positions
A32	JCP Deposit File Batch #	Assigns the next batch number to uniquely identify a deposit table transmitted to the J.C. Penney credit card authorization service	(No field defined in Order Administration) Numeric, 3 positions
A33	JCP Deposit File Sequence #		
A34	Item #	Assigns the next item number in item entry if Auto assign item # in the System Control table = Selected.	(No field defined in Order Administration) Numeric, 9 positions maximum
A36	Item to Item Tfr ID#	Assigns the next number to identify an item to item transfer (item transaction code = G). The system uses the same ID number for both the "from" and "to" items.	ITH ID Numeric, 9 positions (the system adds an additional position to the beginning of the number containing the letter "**I**")
A38	Outlet Transfer	Assigns the next control number for items requested for replenishment by outlet warehouses.	ARD Control number Numeric, 9 positions

Code	Number Assignment	Description	Field name/length
A39	Cash Receipts Transaction ID	Assigns the next number to a new batch of payment transactions, whether you are using the Cash Receipts or the Batch Payment function.	(no field defined in Order Administration) Numeric, 9 positions maximum
A40	Internet Order Batch	Assigns the next control number when you process a batch of orders received through the internet interface.	Numeric, 5 positions
A41	GECC Batch Sequence #	Assigns the next sequence number to identify a deposit table transmitted to the GECC credit card authorization service.	(No field defined in Order Administration) Numeric, 9 positions
A42	PkMS Pick Number	Not currently implemented.	OCR B Number Numeric, 7 positions
A43	PkMS Case Number	Not currently implemented.	Case number Numeric, 10 positions
A47	Order Number Download	Not currently implemented.	(No field in Order Administration)
A48	Check Interface Download ID	Not currently implemented.	No field defined in Order Administration Numer ic, 7 positions
A49	PkMS Case Control Number	Not currently implemented.	Batch control number Numeric, 10 positions
A50	PkMS Item Control Number	Not currently implemented.	Batch control number Numeric, 10 positions
A51	PkMS Pick Control Number	Not currently implemented.	Batch control number Numeric, 10 positions
A52	PkMS PO/ASN Control Number	Not currently implemented.	Batch control number Numeric, 10 positions
A53	PkMS Vendor Control Number	Not currently implemented.	Batch control number Numeric, 10 positions
A57	SKU Quick Price Update Number	Assigns the next sequence number to each SKU/offer price created in Update SKU Offer Prices so that multiple users can create SKU/offer prices at one time.	Job number Numeric, 6 positions
A58	Vendor Number	Assigns the next sequence number when you create a new vendor, skipping over numbers already assigned to vendors.	Numeric, 7 positions
A60	Item File Transfer #	Not implemented.	No field defined in Order Administration Numeric, 6 positions
A61	Item Note File Transfer #	Not implemented.	No field defined in Order Administration Numeric, 6 positions

Code	Number Assignment	Description	Field name/length
A62	PO File Transfer #	Not implemented.	No field defined in Order Administration Numeric, 6 positions
A63	Vendor File Transfer #	Not implemented.	No field defined in Order Administration Numeric, 6 positions
A64	Returns File Transfer #	Not implemented.	No field defined in Order Administration Numeric, 6 positions
A65	Pick Ticket File Transfer #	Not implemented.	No field defined in Order Administration Numeric, 6 positions
A66	Stop Ship File Transfer #	Not implemented.	No field defined in Order Administration Numeric, 6 positions
A67	Immediate Need File Transfer #	Not currently implemented.	No field defined in Order Administration Numeric, 6 positions
A68	Transaction Sequence #	Assigns the next sequence number to the online authorization when you receive a response from the authorization service during online credit card authorization.	Transaction sequence # Numeric, 15 positions
A69	PkMS Immediate Need Control Number	Not currently implemented.	Batch control # Numeric, 10 positions
A71	Batch Auth File Trace Number	Assigns the next sequence number to the Reference ID field in the Integration Process Control table.	Reference ID Alphanumeric, 16 positions
A72	Tickler Number	Assigns the next sequence number to the Tickler number field for a newly created tickler.	Tickler number Numeric, 9 positions
A74	Alternate Customer #	Assigns the next sequence number to the Alternate customer number field whenever a new customer is created if the Assign Alternate Customer # (I88) system control value is selected.	Alt customer # Alphanumeric, 15 positions
C10	POS Customer #	Used with a series of other data to build a customer number for a point-of-sale (POS) system.	Customer id Numeric, 6 positions
C11	POS Transaction #	Sequential number that is used for sending activities to a POS system. The POS Transaction # is not related to a transaction but is required to pull sales transactions into the POS system.	Transaction id Numeric, 8 positions

Create Number Assignment Screen

Purpose: Use this screen to define the number assignments required for system installation. See Available Number Assignments.

How to display this screen: Select Create at the Work with Number Assignment Screen.

Field	Description
File code	A unique identifier assigned to each number assignment. Once a file code is assigned, it cannot be changed, only deleted. See Change Number Assignment Screen. Alphanumeric, 3 positions; display-only.
Last #	The most recent number automatically assigned by the system or set manually. The last number must be greater than or equal to the value in the Start # field. Numeric, 9 positions; required.
Start #	The initial value for a number assignment. Numeric, 9 positions; required.
End #	The highest possible number to be assigned for a number assignment. Numeric, 9 positions; required. Although 9 positions are available for the **Start # and End # fields, actual field lengths vary. For specific field lengths, refer to the table entitled** Available Number Assignments
Reset date	The date on which you changed the value in the Last # field manually. Enter a reset date each time you update the value in the Last # field. Numeric, 6 positions (in user date format); required (only if last number is changed manually).

Copy Company Info Window (Copying a Number Assignment)

Purpose: Use this window to copy a number assignment to one or all of the companies set up on your system.

How to display this screen: At the Work with Number Assignment Screen, select Copy for the number assignment you wish to copy.

Field	Description
Company code	A code to uniquely identify a company set up on your system. A company contains a single, isolated set of tables and data: it is an organization of financial information, inventory, and customers that is completely separate from another company. Numeric, 3 positions; required.

To copy to one company: Enter the company code to which you wish to copy a number assignment and Select OK.

To copy to all companies: Select All Companies.

Change Number Assignment Screen

To change: Select Change for the number assignment at the Work with Number Assignment Screen to advance to the Change Number Assignment screen. You can change all fields on this screen except the File code field.

See Create Number Assignment Screen for a description of the fields on this screen.

Display Number Assignment Screen

To display: Select Display for the number assignment at the Work with Number Assignment Screen to advance to the Display Number Assignment screen. You cannot change any information on this screen.

See Create Number Assignment Screen for a description of the fields on this screen.

Setting Up Secured Features

Setting Up Secured Features provides an overview of the Secured Features table and describes how to set up and change the values in this table.

Menu Driver Screen

Purpose: You can use any menu in the system to advance to a different menu or a menu option, scan for menus and menu options, display current order statistics, and advance to administrative options.

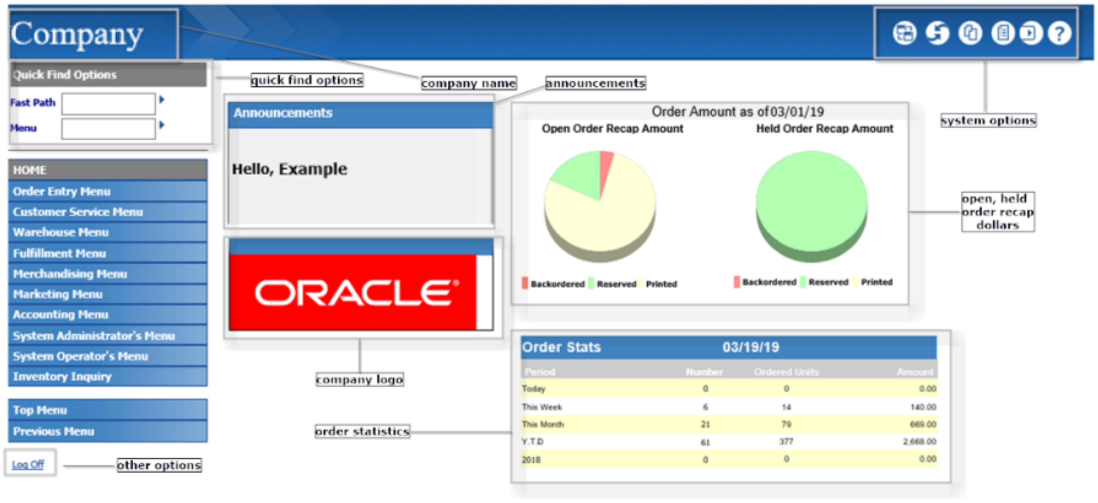
Some important features of the menu driver include:

- Quick Find Options: Fast Path, Menu selection, and menu advancement
- Link to log out of Order Administration
- Announcements
- Charts depicting open and held order dollar totals
- Company logo and default company image
- Order and shipment statistics for the day, week, month, year, and previous year, or a company-specific image for users who do not have authority to view this information
- Standard icons to change companies, advance to administration screens (My Docs, My Jobs, My Forms), or open the online help
- If the current company is not flagged as an Active company, the screen displays a message: This company is flagged as inactive and should not be used to process live orders. See the Change Company Screen for information on setting this flag.

Modern View: OACS Modern View is a separate component of Order Administration and includes the Contact Center. Your user configuration controls whether you advance automatically to Order Administration Classic View or Modern View when you first log in.

Contact Center: A component of Modern View that provides the ability to create, work with, or review orders.

The System Options provide an option to advance to Modern View.



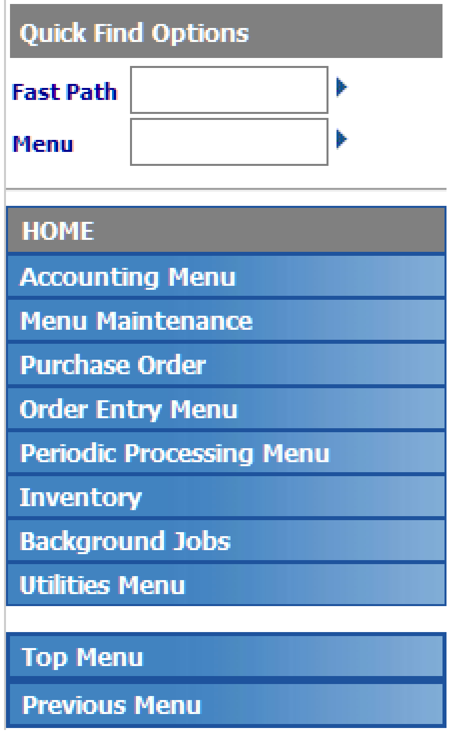
> ✏ **Note:**
>
> When you sign on to the system, you advance to your default menu. To display the HOME menu (if it is not your default menu, or to return to it from a different menu), enter HOME in the Menu field.

In this topic:

- Quick Find Options
- Announcements
- Company Logo
- System Options
- Open, Held Order Recap Amounts
- Order Statistics
- Other Options

Quick Find Options

Purpose: Use the quick find options to advance to a menu option or a menu.



For more information: See Menu Driver Screen for the location of the quick find options, and links to other options available at the Menu Driver screen.

Field	Description
Fast Path	Use this field to enter a unique code for a menu option, providing direct access without advancing through the menus. Each option on the system has a Fast Path name. For example, if you enter MITM in the Fast Path field, you advance to Work with Items/SKUs. If you do not know the option name, you can click on the arrow. You advance to the Select Menu Options Window, where you can search and select the desired option. When accessible to the user, the Fast Path and Menu fields can be displayed or hidden by selecting Toggle Fast Path/Menu. The Fast Path setting in the user's record controls whether menus display the Fast Path field. See User Configuration in the Administration Guide. **Modern View options:** Menu options with a Type of Modern View are not available in Order Administration Classic View. If you enter the Fast Path for a Modern View option, the screen displays an error. Alphanumeric, 4 positions; optional.

Field	Description
Menu	Use this field to enter a unique menu name to advance it directly without advancing through the menu tree. For example, if you enter INVENTORY in the Menu field, you advance to the Inventory Menu. If you do not know the menu name, you can click on the arrow to advance to the Select Menu Window, where you can search and select the desired menu. The Fast Path setting in the user's record controls whether menus display the Menu field. See User Configuration in the Administration Guide. Alphanumeric, 10 positions; optional.
Menu	The short name of the current menu. Alphanumeric, 10 positions; display-only.
Menu names	Use the links below the current menu name to advance through the menu tree to select a different menu or a menu option. The description of each menu or menu option assigned to the current menu through the Customizing Menus (WMNU) option is available for selection. For example, the Periodic Processing menu is assigned to the HOME menu. If you select this menu, the menus and menu options assigned to the Periodic Processing menu (such as Work with Periodic Processes) are listed. See Customizing Menus (WMNU) for information on assigning menus and menu options to menus. **Modern View options:** Menu options with a Type of Modern View are not available in Order Administration Classic View, and are not displayed if they are included in the current menu. Menu description: alphanumeric, 20 positions; optional. Menu option description: alphanumeric, 40 positions; optional.
Top Menu	Use this option to return to the Default menu from your user profile, as set up though Working with User Records (WUSR). See User Configuration in the Administration Guide for background.
Previous Menu	Use this option to return to the previously displayed menu.

Announcements

Purpose: Working with User Records (WUSR)), and any announcements that you have set up through the Working with Announcements (WANN) menu option.

For more information: See Working with Announcements (WANN) for a discussion, and see Menu Driver Screen for the location of the announcements, and links to other options available at the Menu Driver screen.

Company Logo

Purpose: This area of the menu screen displays the company logo, if one has been set up; otherwise, the Oracle default company logo displays if you have not set up a company logo.

See Setting Up Company Logos for Menu Screens and the Modern View Home Page for setup information, and see the Menu Driver Screen for the location of the company logo on the screen, and for links to other options available at the Menu Driver screen.

System Options

Purpose: The upper right area of the menu screen includes various system options and information.

The system options, described below, are available at many other screens throughout Order Administration.

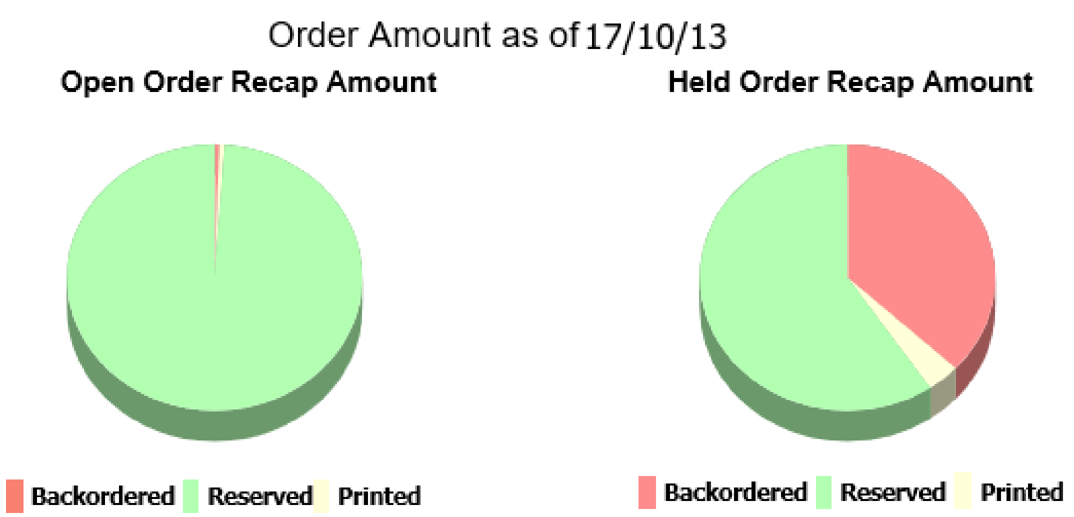
Option	Description
Modern View 	Select this option to advance to Modern View, including the Contact Center. This option is not available at all screens. For example, it is available at the menu screen and at the initial search screen in order inquiry, but not at any subsequent screens in order inquiry. **Retain company?** When you advance to Modern View, the currently selected company is retained. For example, if your default company is company 2 but you had previously selected company 1, when you advance to Modern View, company 1 is retained. However, if you select a different company in Modern View, when you return from Modern View to Order Administration Classic View, the company selected in Modern View is not retained. For example, if you were working in company 1 in Order Administration Classic View and then selected company 2 in Modern View, you return to company 1 in Order Administration Classic View. **Note:** If you do not have sufficient authority to review or work with orders, no customer or order search options are available. Contact your system administrator if this occurs.
Change Company 	Select this option to display the Select Company window, where you can select another company to work in. Your user profile controls the companies available for selection at this window; See User Configuration in the Administration Guide for more information. This option is not available at all screens. For example, it is available at the menu screen and at the initial search screen in order inquiry, but not at any subsequent screens in order inquiry.

Option	Description
My Docs	Select this option to advance to the Document Management (My Docs) screen.
My Jobs	Select this option to advance to the Job Management (My Jobs) screen.
My Forms	Select this option to advance to the Forms Management (My Forms) screen.
Help	Select this option to display the online help in a separate browser window. When you select this option from a menu screen, it displays the Contents page. **Trouble with online help**? If online help pages are slow to load or if the search function doesn't work correctly, try clearing the browser's cache or history.

For more information: See the Menu Driver Screen for the location of the system options, and links to other options available at the Menu Driver screen.

Open, Held Order Recap Amounts

Purpose: These pie charts on the menu screen provide a graphical "snapshot" of your open and held orders as of the last time the Batch Order Control (ORD_CONTRL) job ran on or since the displayed current date.



Operations Control totals: These totals are also available for review at the First Operations Control Summary Screen in the Reviewing Operations Control Summary (FLSH) menu option.

User authority to order totals: The Display Order Statistics and Recap (J03) secured feature controls whether a user sees these totals and the Order Statistics, a default company-specific image, or a blank area. See Setting Up Menu Driver Images for Companies for more information on setting up these images for users who do not have authority to view the open and held order totals.
Date displayed: The current date always displays in the user's date format.

Example: Today is August 27, and the charts display the Order Recap information from the First Operations Control Summary Screen as of the last time you ran the Batch Order Control job today. If the current time is 10:00 a.m. and you last ran the Batch Order Control job at 8:30 a.m., the charts display the totals from 8:30.

Updating the totals: If you use the Reviewing Operations Control Summary (FLSH) menu option to update current totals, the system submits the Batch Order Control job. Until this job has finished running, the totals will not be accurate. You can refresh (press F5) or review the job status at the Job Management (My Jobs) screen. There are also situations when the Batch Order Control job starts automatically; see Reviewing Operations Control Summary (FLSH) for an overview.

Totals mapping: Each of the totals that make up the pie charts is also listed on the bottom half of the First Operations Control Summary Screen:

- Open Order Recap Amount pie chart
  - Backordered = OBO (Open/backordered) amounts
  - Printed = Opn/Prt (Open/Printed) amounts
  - Reserved = Opn/Rsv (Open/reserved) amounts
- Held Order Recap Amount pie chart:
  - Backordered = HBO (Held/backordered) amounts
  - Printed = Hld/Prt (Held/printed) amounts
  - Reserved = Hld/Rsv (Held/reserved) amounts

For more information: See Reviewing Operations Control Summary (FLSH) for background on Order Control Summary processing, and see Menu Driver Screen for the location of the Open, Held Order Recap Amount pie charts, and links to other options available at the Menu Driver screen.

> **Note:**
>
> This area of the Home screen is blank when you select a company that does not yet have any existing orders.

Order Statistics

The setting of the FLASHPIECHARTS setting in Working with Customer Properties (PROP) defines the order statistics that display on the Menu Driver Screen.

- FLASHPIECHARTS = The order statistics section of the menu screen displays total numbers and amounts of orders created by the current date, current week, current month, year to date, and previous year. Use this setting if the Delay Billing Updates (K85) system control value is selected.

Order Stats	17/11/16		
Period	Number	Ordered Units	Amount
Today	0	0	0.00
This Week	0	0	0.00
This Month	0	0	0.00
Y.T.D	315	690	46,526.24
2016	86	141	2,062.42

- FLASHPIECHARTSFULL = The order statistics section of the menu screen displays total numbers and amounts of orders created and shipped by the current date, current week, current month, year to date, and previous year. Use this setting if the Delay Billing Updates (K85) system control value is unselected.

Order Stats	17/11/16			
	Ordered		Shipped	
Period	Number	Amount	Number	Amount
Today	7	4,764.14	0	0.00
This Week	70	122,397.86	0	0.00
This Month	102	159,222.07	19	5,541.54
Y.T.D	217	175,382.16	25	5,750.91
2016	108	20,620.85	31	7,465.33

User authority to order statistics: The Display Order Statistics and Recap (J03) secured feature controls whether a user sees these statistics and the Open, Held Order Recap Amounts, a default company-specific image, or a blank area. See Setting Up Menu Driver Images for Companies for more information on setting up these images for users who do not have authority to view order statistics.

Date displayed: The date always displays in the user's date format.
Continuous order updates: The background jobs update the totals displayed here throughout the day as you create and ship orders. This information corresponds to the Ord and Shp totals displayed on the top half of the First Operations Control Summary Screen in the Reviewing Operations Control Summary (FLSH) menu option. These totals do not include other types of order activity, such as cancels, returns, or selling out an existing order line.

Totals mapping: Each of the totals listed in the Order Statistics area is also listed on the top half of the First Operations Control Summary Screen:

- Ordered
  - Number = Ord (Orders) Orders
  - Amount = Ord (Orders) Amounts
- Shipped
  - Number = Shp (Shipped) Orders
  - Amount = Shp (Shipped) Amounts

See the First Operations Control Summary Screen for more information.

Calculation of time periods: The time periods listed in the Order Statistics area are calculated as follows:

Date	Description
Today	The current system date.
This week	The current week runs from Monday through Sunday, and the totals displayed include all days for this period. Week crosses months and years: The calculation of totals for This week occurs regardless of whether a new month starts during the week. Example: Today is Sunday June 3. The totals displayed under This week include Monday May 28 through the current date.
This month	The totals for the current month.
Y.T.D.	The totals year-to-date.
Previous year (field name varies depending on the current year)	The totals for the previous year.

For more information: See Reviewing Operations Control Summary (FLSH) for background on the calculation of these totals, and see Menu Driver Screen for the location of the Order Statistics and links to other options available at the Menu Driver screen. Also, see Sales Summary (DSSS) for a menu option you can use to review shipment totals by date, week, or month, including the current day's totals broken out by order type and entity.

Other Options

Purpose: These additional options are:

- Log Off: Use this option to exit Order Administration and display the login screen.
- My Profile: Use this option to advance to the User Control screen. From this screen, you can change other user control records if you have the proper authority. The My Profile option is not available if you are using Oracle Identity Cloud Service for password authentication.

9 Marketing

Setting Up Offer Information

Topics in this part: The following topics describe how to set up and change offer information:

- Introducing Offer and Source Codes provides an overview of the steps you need to follow and the basic information you need to set up an offer.
- Working with Offers (WOFR) describes how to create and change offer information, set up free gifts, freight charges, service charges, and discounts for an offer.
- Working with Season Codes (WSEA) describes how to create and change season information.
- Working with Promotions (WPRO) describes how to create and change promotion value information, which is used in Source Code reporting.
- Working with Source Categories (WSCT) describes how to create and change source categories, which are used for source code reporting.
- Working with Source Codes (WSRC) describes how to create and change source code information, review source code history, set up free gifts, freight charges, service charges, and discounts for a source code.
- Working with Dollar Chart by Offer (WDCO) describes how to establish dollar discounts by offer.
- Working with Dollar Chart by Source Code (WDCS) describes how to establish dollar discounts by source code.
- Initializing an Offer (MOFI) describes how to save and then delete order history for an offer, and transfer data from one offer to another.
- Working with Special Pricing by Source Code (WSPP) describes how to define special price breaks for multiple items and/or source code quickly.
- Generating Source Codes Using the Source Upload Table (WSRW) explains how to create an Order Administration source code using information from the Source Code Work file.

Working with Offers (WOFR)

Purpose: An offer represents the medium that you use to present merchandise to your customers, for example a catalog, space advertisement, television advertisement, or web site. Use Work with Offers to create and change offer information, define items as free gifts, and set up freight charges, service charges, and discounts for an offer.

Multiple currencies: You also must define a currency for the offer if you process orders in multiple currencies *(the Multi Currency by Offer (E03)* system control value is *selected*).

In this topic:

- *Work with Offers Screen*
- *Create Offer Screen*
- *Work with Offer Free Gifts Screen*
- *Work with Offer Dollar Discounts Screen*
- *Work with Linked Offers Screen*
  – *Linked Offers in Order Entry*
- *Copy Offer Freight Charges Window*

Work with Offers Screen

Purpose: Use this screen to work with information in existing offers or create a new offer.

How to display this screen: Enter *WOFR* in the Fast path field at the top of any menu or select Work with Offers from a menu.

Field	Description
Offer	The unique code that identifies the catalog, space, television advertisement or web site you use to accept orders. Alphanumeric, 3 positions; optional.
Description	The description of the offer. Alphanumeric, 30 positions; optional.
Type	The code that describes the type of offer. This is a user-defined code that is not validated against any table. Use offer type codes for reporting and analysis. Alphanumeric, 1 position; optional.
Begin (Begin date)	The first date when you can begin to accept orders for the offer. Numeric, 6 positions (in user date format); optional.
End (End date)	The last date that you can accept orders for the offer. Numeric, 6 positions (in user date format); optional.
Season	A code that represents a season to display offers; used for tracking and analysis. Alphanumeric, 3 positions; optional.

Screen Option	Procedure
Create an offer	Select *Create* to advance to the Create Offer Screen.

Screen Option	Procedure
Change an offer	Select *Change* for an offer to advance to the Change Offer screen. For field descriptions, see Create Offer Screen. You can change all of the information except the Offer code field.
Delete an offer	Select *Delete* for an offer to delete an offer. **Note:** You cannot delete an offer if there are any orders for this offer. You must use Initializing an Offer (MOFI).
Display an offer	Select *Display* for an offer to advance to the Display Offer screen. You cannot change any fields on this screen. For field descriptions, see Create Offer Screen.
Copy freight charges from one offer to another	Select *Copy freight charges* for an offer whose freight charges you want to copy to advance to the Copy Offer Freight Charges Window.
Define dollar discounts for an offer	Select *Dollar discount* for an offer to advance to the Work with Offer Dollar Discounts Screen.
Define items as free gifts for an offer	Select *Free Gifts* for an offer to advance to the Work with Offer Free Gifts Screen.
Define freight charges for an offer	Select *Freight Charges* for an offer to advance to the *Work with Dollar Chart by Offer Screen (Freight Charges)*.
Define a sub-offer for an offer	Select *Linked offers* for an offer to advance to the Work with Linked Offers Screen.
Define service charges for an offer	Select *Service Charges* for an offer to advance to the Work with Dollar Chart by Offer Screen (Service Charges).
Work with source codes for an offer	Select *Source Codes* for an offer to advance to the Work with Source Codes for Offer. This screen includes all the same options as the *Work with Source Codes Screen*, and also enables you to scan source codes for a particular offer rather than all source codes in your company. See the Work with Source Codes Screen for field descriptions and more information.
Define a user defined field	Select *User Field* for an offer to advance to the Work with User Fields screen. See Setting Up User-Defined Fields (WUDF).

Create Offer Screen

Purpose: Use this screen to create a new offer.

How to display this screen: Select *Create* on the Work with Offers Screen.

Field	Description
Offer	The unique code that identifies the catalog, space, television advertisement or web site you use to accept orders. Alphanumeric, 3 positions. Create screen: required. Change screen: display-only.
Description	The description of this offer. Alphanumeric, 30 position; required.
Offer type	The code that describes the type of offer. This is a user-defined code that is not validated against any table. Use offer type codes for reporting and analysis. Alphanumeric, 1 position; required.
Offer date range	The start and end dates for the prices you define for this offer. Orders entered prior to the start date and after the end date will not use these prices. The system searches backwards by end date for the next most recent price and does not consider an offer with a start date greater than the order date. If the system can not find a price, it displays an invalid price message in Order Entry. If you process orders in multiple currencies, the system searches for a price only in offers with the same currency. See the *Currency of offer (when using multiple currency by offer)* field. Numeric 6 positions each (in user date format); required.
Currency of offer (when using alternate currency pricing)	The currency for orders you process for this offer when using alternate currency pricing. **Note:** Displayed only if the Use Alternate Currency Pricing (H89) system control value is *selected*. If you enter a currency code in this field, you must enter a conversion rate in the *Conversion rate (when using alternate currency pricing)* field or an error message indicates `Conversion rate required`. Leave this field blank if this offer is in your local currency (the currency code defined in the Local Currency Code (A55) system control value). When you enter a source code associated with this offer in order entry, the system searches for a price only among offers that share this currency. The currency and conversion rate used on an order are stored in the Order Header Extended table. Currency codes are defined in and validated against the Currency table; see Working with Currency (WCUR). See Using Alternate Currency Pricing for an overview and required setup. Alphanumeric, 3 positions; required if you enter a conversion rate.

Field	Description
Conversion rate (when using alternate currency pricing)	The rate at which the currency defined for the offer is converted to and from the local currency if you are using alternate currency pricing. **Note:** Displayed only if the Use Alternate Currency Pricing (H89) system control value is *selected*. If you enter a conversion rate in this field, you must enter a currency code in the Currency of offer (when using alternate currency pricing) field or an error message indicates `Offers require a currency when using multi-currency`. Leave this field blank if this offer is in your local currency (the currency code defined in the Local Currency Code (A55) system control value). The system multiplies the amount in the local currency by the conversion rate to determine the amount in the alternate currency. Likewise, the system divides the amount in the alternate currency by the conversion rate to determine the amount in the local currency. The local currency is the currency code defined in the Local Currency Code (A55) system control value. See Using Alternate Currency Pricing for an overview and required setup. Numeric, 13 positions with a 7-place decimal; required if you enter a currency of offer.
Season	The code that represents the season associated with this offer. Season codes are defined in and validated against the Season table. See *Working with Season Codes (WSEA)*. Season codes are used for reporting and analysis. Alphanumeric, 3 positions; optional.

Field	Description
Currency of offer (when using multiple currency by offer)	The currency for orders you process for this offer when using multiple currency by offer. **Note:** Displayed only if the *Multi Currency by Offer (E03)* system control value is *selected*. When you enter a source code associated with this offer in Order Entry, the system will search for a price only among offers that share this currency. Additionally, you cannot override the offer on an order detail line to one with a different currency. The currency used on an order is indicated by the bank code on various screens and reports, such as those having to do with refunds. This is because each currency must be associated with at least one unique bank. When you create a source code, you must specify a division which links to a bank code that is consistent with the currency of the offer. The currency code is defined in and validated against the Currency table. See *Working with Currency (WCUR).* Alphanumeric, 3 positions; required if it appears on the screen.
Conversion rate (when using multiple currency by offer)	The current conversion rate in effect for the currency, as specified in the Currency table. **Note:** Displayed only if the *Multi Currency by Offer (E03)* system control value is *selected*. The actual conversion rate displays only on the Change and Display Offer screens, once you have specified the currency for the offer. Numeric, 13 positions with a 7-place decimal; display-only.
Flat freight rate	The amount of freight charged to the customer on each order placed against this offer. The system uses this rate if the *Freight method* for the source code is set to *Flat Rt/Ship To*. Numeric, 13 positions with a 2-place decimal; optional.
Guaranteed order charge	The charge required to guarantee an order. If the Guaranteed Order Charge field in Order Entry is *selected*, the charge defined in this field will be added to the order as an additional charge. You can exclude the Guaranteed Order Charge at the source code level. See the *Excl serv chg (Exclude service charges)* field. Numeric, 13 positions with a 2-place decimal; optional.

Field	Description
Additional charge code (for Guaranteed service charges)	If you defined a Guaranteed Order Charge in the previous field, you must enter a code in this field that identifies the type of charge. This code is validated against the Additional Charges Code table; see *Establishing Additional Charge Codes (WADC)*. Alphanumeric, 2 positions; required if Guaranteed order charge was entered.
Addl charge code (for Dollar chart charges)	A code that represents the type of additional charge on an order. The additional charge refers to a service charge, if you have set up a dollar chart through the *Work with Dollar Chart by Offer Screen (Service Charges)* screen or through *Working with Dollar Chart by Source Code (WDCS)*. This code is validated against the Additional Charges Code table; see *Establishing Additional Charge Codes (WADC)*. **Note:** The *Excl serv chg (Exclude service charges)* flag for the source code does not control whether to apply these service charges to an order. Alphanumeric, 2 positions; optional.
Date of 1st order	The date you process the first order for this offer. The system creates this record. Numeric, 6 positions (in user date format); display-only, defined by the system.
Default source	A source code the system defaults to an order. • If the Default Offer Source Code to Order Detail Line (G28) system control value is *selected*, the system defaults this source code to an order detail line when the offer on the detail line is not associated with the source code on the order header. • If the Default Unknown Source Code (I58) system control value contains a source code, the system defaults this source code to the order header if the original source code entered on the order matches the source code in this system control value. Additionally, if this system control value contains a source code, the system requires you to enter a default source for the offer. If you haven't created the source codes for the offer yet, you must enter a "dummy" source code until you create the actual default source code and then go back to the offer and enter the actual source code in the Default source field. Source codes are defined in and validated against the Source Code table. See Working with Source Codes (WSRC). Alphanumeric, 9 positions; required if the Default Unknown Source Code (I58) system control value contains a source code.

Work with Offer Free Gifts Screen

Purpose: Use this screen to define the items to add as free gifts to orders that amount to a required merchandise dollar total.

Free gifts applied when? In order entry, the system determines if the order is eligible for the free gift during repricing, the initial order accept, and the final order accept; if the order is eligible for the free gift, the system applies it to the order. See Applying Free Gifts.

Price override: The system uses the Default Price Override Reason (B35) system control value to add the free gift at no charge.

Things to note: The following factors influence how the system adds free gifts to the order:

- *Offer price or selling price?* To evaluate whether an order qualifies for a free gift, the system compares the total merchandise dollar value after applying any discounts or repricing (that is, the extended selling price of all items) with the $ required specified for the free gift.
- *Multiple gifts?*
- If the Allow multiple gifts flag is *selected*, the system adds the free gift defined for each dollar threshold met by the order total. For example, if a free gift is defined for an order total of $10.00, $15.00, and $20.00 and the customer orders $30.00 worth of merchandise, the system will add the free gifts for a $10.00, $15.00, and $20.00 order.
- If the Allow multiple gifts flag is *unselected*, the system adds the free gift defined for the highest dollar threshold met by the order total. For example, if a free gift is defined for an order total of $10.00, $15.00, and $20.00 and the customer orders $17.50 worth of merchandise, the system will add the free gift defined for a $20.00 order, because this is the highest level for which the order qualifies.
- *Source vs. offer free gifts:* You can also set up free gifts at the source code level using the *Work with Source Free Gifts Screen*; however, free gifts by source code override free gifts by offer. If an order would qualify for both the offer and source code free gifts, only the source code's free gift is added to the order.

How to display this screen: Select *Free Gifts* for an offer on the *Work with Offers Screen*.

Field	Description
Offer	The unique code and description for the catalog, space, television advertisement or web site from which you accept orders. Offer: Alphanumeric, 3 positions; display-only. Description: Alphanumeric, 30 positions; display-only.
Allow multiple gifts?	Indicates if a customer can receive more than one free gift on an order. • *Selected* = Apply more than one free gift on an order if the order qualifies. • *Unselected* = Apply only free gift with the highest dollar level for which the order qualifies.
$ Required	The merchandise dollar amount required on an order for the customer to be eligible for the free gift. You must enter a dollar amount of `$0.01` or higher. You cannot enter a negative amount. Numeric, 13 positions with a 2-place decimal; required.

Field	Description
Item	The item to add as a free gift. Alphanumeric, 12 positions; required.
Clr/Size/Wdth	If the specified item has SKUs, enter the SKU to add to qualifying orders. Alphanumeric, three 4-position fields; required if the item has SKUs.
Qty (Quantity)	The number of units of the free gift item to add to the order. Numeric, 5 positions; required.

Work with Offer Dollar Discounts Screen

Purpose: Use this screen to define standard and associate discounts for an offer.

Negative additional charge or prorate? If the Prorate Dollar Discounts and Coupons (D90)*Prorate Dollar Discounts and Coupons (D90)* system control value is *unselected*, the system adds these discounts to the order as a negative additional charge, or credit. If this system control value is *selected*, the dollar discount is applied on a pro-rata basis to each item on the order and is reflected in the selling price. This discount is calculated after all other discounts have been applied, and it is not related to the system's pricing hierarchy; it applies regardless of any other pricing method used.

Discount sale items? The *Exclude Sale Item When Prorating Discounts (I65)* system control value controls whether to include sale items in the pro-rata discount calculation. See that system control value for more information.

How to display this screen: On the *Work with Offers Screen*, select *Dollar discounts* for an offer.

Field	Description
Offer	The unique code and description for the catalog, space, television or web site advertisement from which you accept orders. Offer: Alphanumeric, 3 positions; display-only. Description: Alphanumeric, 3 position; display-only.
Merch amount	The merchandise total on the customer's order. When the merchandise total is equal to or greater than the dollar amount entered in this field, the customer is eligible for the standard and/or associate discount defined for this amount. When evaluating an order to see if it meets the required merchandise total, the system includes sale items (based on the setting of the Sale item flag for the Item Offer or the *Sale item* flag for the SKU Offer). The system does not include non-discountable items (based on the setting of the *Discountable* flag for the item). Numeric, 13 positions with a 2-place decimal; required.
Standard discount	The dollar amount to subtract from the customer's order when the merchandise total on the order is equal to or greater than the dollar amount entered in the *Merch amount* field. Numeric, 13 positions with a 2-place decimal; optional.

Field	Description
Associate discount	The dollar amount to subtract from an associate customer's order when the merchandise total on the order is equal to or greater than the dollar amount entered in the *Merch amount* field. Customers are identified as associates in the Customer record; the Assoc field in Order Entry must be *selected* for this discount to be applied. Numeric, 13 positions with a 2-place decimal; optional.
Add'l code	A code that represents a type of additional charge on an order. The system uses this code only if the *Prorate Dollar Discounts and Coupons (D90)* system control value is *unselected*. In this case, the additional charge refers to a discount, or negative charge, applied against the order. This code is validated against the Additional Charges Code table; see *Establishing Additional Charge Codes (WADC)*. This table contains user-defined values to categorize the different types of charges that may be assessed or the discounts that may be applied against an order. If the *Prorate Dollar Discounts and Coupons (D90)* system control value is *selected*, the system does not use the additional charge code; instead, the discount amount is prorated against the order lines, as described in *Prorating Logic*. Alphanumeric, 2 positions; required if the *Prorate Dollar Discounts and Coupons (D90)* system control value is unselected.

To add: This screen displays in *Add* mode. The cursor is at the *Merch amount* field, so you can begin adding dollar discount information.

Each time you enter a dollar discount, the system arranges the dollar discounts in ascending order from the lowest to highest amounts.

To change: If any dollar discounts have been previously entered in this table, those discounts will display.

To change dollar discount information, select *Change* to switch to *Change* mode.

Place your cursor at the beginning of the field you wish to change. Erase the information and reenter it.

To delete: Select *Change* to switch to *Change* mode and display the discounts for this offer and select *Delete* for a dollar discount to delete it.

Work with Linked Offers Screen

Purpose: Use this screen to create, change, or delete one or more sub-offers for an offer.

Sub-offers for an offer allow you to analyze how certain pages in an offer perform from the rest of the offer. For example, you may want to create a sub-offer if the main offer contains insert pages, such as a section of items sold at a discounted price.

Linked Offers in Order Entry

When you add an item to an order, the system determines the price of the item using the following hierarchy:

- use the price defined for the item in the offer defined at the order detail line (the main offer).

- if a price has not been defined for the item in the main offer, the system uses the price defined for the item in the sub-offer associated with the main offer. If more than one active sub-offer is associated with the main offer, the system uses the first sub-offer in sequence number sequence.
- if a price has not been defined for the item in any sub-offers linked to the main offer, the system uses the price defined in the most current active offer.

How to display this screen: Select *Linked Offers* for an offer at the *Work with Offers Screen*.

Field	Description
Offer	The unique code and description for the catalog, space, or television advertisement from which you accept orders. Offer: Alphanumeric, 3 positions; display-only. Description: Alphanumeric, 30 position; display-only.
Linked offer	The code for the sub-offer associated with this offer. Alphanumeric, 3 positions; optional.
Sequence number	The sequence number determines the order in which the system looks at the sub-offers associated with this offer. Numeric, 3 positions; optional.
Description	The description of the sub-offer associated with this offer. Alphanumeric, 30 positions; display-only.

To create: Enter a valid offer code in the *Linked offer* field and a sequence number in the *Sequence number* field. The system displays the sub-offer you created on the bottom half of the screen.

An error message indicates if you enter an offer in the *Linked offer* field that is not a valid offer:

Offer not found.

An error message indicates if you enter a sequence number in the *Sequence number* field that is already associated with another sub-offer:

Sequence Number Already Exists.

To change: Select *Change* to make the *Sequence number* field enterable. You can only change the sequence number assigned to the sub-offer.

Screen Option	Procedure
Change between add mode and change mode	Select *Change*. The system toggles between making the *Sequence number* field enterable and display-only.

Copy Offer Freight Charges Window

Purpose: Use this window to copy the freight dollar chart charges from one offer to another.

How to display this window: Select *Copy freight charges* for an offer whose freight charges you want to copy. If the offer you select does not already have freight charges set up, the screen displays an error message. See *Work with Dollar Chart by Offer Screen (Freight Charges)* for information on how to set up and work with freight charges for an offer.

Completing this screen: Enter the code representing the offer to which you would like to copy the freight charges. Select *OK* at the Confirm prompt.

If the target offer already has freight charges set up, the system displays an error message:

Offer already has freight charges defined.

Working with Season Codes (WSEA)

Purpose: A season code represents a season, such as winter 2006. You use season codes to group offers together for reporting or querying. For example, you can group offers associated with the season code "spring 2006" in order to review how profitable the offers are for that specific year.

Season codes assigned to offers are also used when you define shipping date restrictions for weather-sensitive items such as plant stock. For example, the spring start date for shipping bare root plants would be different from the fall start date for shipping bare root plants. See *Shipping Zone Reservation Overview*, for more information on setting up shipping zone restrictions for weather-sensitive items.

You assign season codes to an offer in *Working with Offers (WOFR)*.

In this topic:

- *Work with Seasons Screen*
- *Create Season Screen*

Work with Seasons Screen

Purpose: Use the Work with Seasons screen to create, change, delete and display season codes.

How to display this screen: Enter *WSEA* in the Fast path field at the top of any menu or select Work with Seasons at a menu.

Field	Description
Season	A code that represents a season, such as WIN (winter). Alphanumeric, 3 positions; optional.
Description	The description of the season code. Alphanumeric, 30 positions; optional.

Screen Option	Procedure
Create a new code	Select *Create* to advance to the *Create Season Screen*.
Change a season code	Select *Change* for a season code to advance to the Change Season screen. At this screen you can change any information but the season code. For field descriptions, see *Create Season Screen*.

Screen Option	Procedure
Delete a season code	Select *Delete* for a season code to delete it. **Note:** You cannot delete a code if it is assigned to an offer. A message similar to the following displays informing you that season is assigned to a catalog: `Season (AUT AUTUMN) cannot be deleted - currently referenced by a catalog.`
Display a season code	Select *Display* for a season code to advance to the Display Season screen. You cannot change any information on this screen. For field descriptions, see *Create Season Screen*.

Create Season Screen

Purpose: Use this screen to create new season codes.

How to display this screen: At the *Work with Seasons Screen*, select **Create**.

Field	Description
Season	A code used to represent a season. You can assign a season to an offer through Work with Offers. Season codes assigned to offers are a required value for defining shipping date restrictions for weather-sensitive items such as plant stock. See *Shipping Zone Reservation Overview*. Alphanumeric, 3 positions. Create screen: required. Change screen: display-only.
Description	The description of the season code. Alphanumeric, 30 positions; required.
Start date	The date you specify as the beginning of the season. The season start date can be used in order entry to control reservation of weather-sensitive items, which you designate by assigning zone reservation codes to the items. Zone reservation coded items ordered before the Start date for their season will be taken as future orders. See Shipping Zone Reservation Overview. Numeric, 6 positions, in user date format; optional.
End date	The date you specify as the end of the season. This date is informational only. Numeric, 6 positions, in user date format; optional.

Working with Promotions (WPRO)

Purpose: Use the Work with Promotion Values function to create and change promotions for reporting, analysis, discounting, or messages in order entry.

Note that these settings are not used when integration to Oracle Retail Promotion Engine (ORPE) is enabled (SCV M77).

A promotion code can perform either or both of the following functions:

- *Messaging:* Set up messages to appear in a pop-up window in order entry for orders using a source code assigned to a promotion.
- *Discounting:* You can use a promotion to:
- discount merchandise (percentage, prorated discount, or price override)
- apply a negative additional charge
- add free gifts
- discount freight
- discount additional freight
- override the ship via on an order

Available order criteria include:

- date range
- source code or offer
- total merchandise value on the order or within an item category or price code
- total order quantity or quantity within an item category or price code
- ship via priority
- ship-to country or SCF
- pay type
- first-time customers only
- customer group or specific customer

Additionally, you can use promotions for source code reporting and analysis purposes.

Promotion analysis report: You can use the Promotion Analysis Report to evaluate the promotions active within a range of dates, or a specific promotion. See Print Order Promotion Analysis Report (POPA) for more information.

In this topic:

- About Messaging Promotions
- About Discount Promotions
  - BOGO (Buy One/Get One) Discount or Free Gift by Item Category or Item
  - BOGO (Buy One/Get One) Discount or Free Gift by Price Code
  - Item Category Discount
  - Order Discount

Not in this topic: This topic does not describe promotional pricing. For more information on these menu options, see:

- Work with Promotional Pricing Groups (WPRG)
- Work with Promotional Pricing (WPRP)

Working with Source Categories (WSCT)

Purpose: You can use the Work with Source Categories function to create and change source categories. A source category identifies a grouping of names that points to a source code, for example, buyers, recipients, etc. You can use the source category assigned to the source code on the order as a criterion for pick slip generation.

You use the *Working with Source Codes (WSRC)* function to assign a category to a source.

In this topic:

- Work with Source Code Categories Screen
- Create Source Category Screen

Work with Source Code Categories Screen

How to display this screen: Enter *WSCT* in the Fast path field at the top of any menu or select this option from a menu.

Field	Description
Cat (Category)	Allows you to enter the code for the source category. Alphanumeric, 2 positions; optional.
Description	The description of the source category. Alphanumeric, 30 positions; optional.

Screen Option	Procedure
Create a source category	Select *Create* to advance to the *Create Source Category Screen*.
Change a source category	Select *Change* for a category to advance to the Change Source Category screen. For field descriptions, see *Create Source Category Screen.* You can only change the Description field on this screen.
Delete a source category	Select *Delete* for a category to delete it.
Display a source category	Select *Display* for a category to advance to the Display Source Category screen. You cannot change any fields on this screen. For field descriptions, see Create Source Category Screen.

Create Source Category Screen

To create: To create a source category, select *Create* at the *Work with Source Code Categories Screen*.

Field	Description
Source Category	The unique code that identifies the source category. Source categories are used to group names for a particular source code. Alphanumeric, 2 positions. Create screen: required. Change screen: display-only.
Description	A description of the source category. Alphanumeric, 30 positions; required.

Working with Source Codes (WSRC)

Purpose: You can use Work with Source Codes to create and change source code information, review source code history, set up free gifts, freight charges, service charges, and discounts for a source code.

Source codes are unique codes used to identify segments of your customer base or a rented list. Each source code is assigned to one offer and one division. Source codes control the freight and pricing method used on an order.

Other common uses of the source code include:

- Identifying the customer's geographic location at the time of an order
- Segmenting lists by source, previous buyers, market test cases, and so on.

Every order must have an identifying source code. These codes are essential to analyzing sales and determining the effectiveness of a particular advertisement or offer. Using source codes you can, for example:

- Analyze market trends
- Track success of offers
- Segment customer bases by criteria you define
- Test an alternate freight or pricing method

Track orders you receive through the ChannelAdvisor integration; see ChannelAdvisor Integration Overview.

Download to web storefront: Use the Downloading E-Commerce Offer Files (EOFR) menu option to select source codes for download; only source codes related to a selected offer are extracted. The extracted file includes company, source code, description, discount percent, and offer.

In this topic:

- *Work with Source Dollar Discounts Screen*
  - *Adding, Changing, and Deleting Dollar Discounts*
- *Copy Source Code Freight Charges Window*

Work with Source Codes Screen

Purpose: Use this screen to work with all existing source codes in your company.

> **Note:**
>
> To review all source codes for a particular offer, use the Source Codes option in *Working with Offers (WOFR)* to advance to the Work with Source Codes for Offer screen. This screen includes all the same options as the Work with Source Codes screen.

How to display this screen: Enter *WSRC* in the Fast path field at the top of any menu or select Work with Source Codes from a menu.

Field	Description
Source	A unique, user-defined code to identify a segment of your customer base and to analyze sales. The source code drives marketing, pricing, freight, and service charge information on an order. Alphanumeric, 9 positions; optional.
Description	The description of the source code. Alphanumeric, 30 positions; optional.
Division	A unique code for a profit center or area of financial reporting. Alphanumeric, 2 positions; optional.
Promotion	A code representing a way of grouping source codes for reporting and marketing purposes. You can also set up a promotion to: • display a pop-up message in order entry; • apply a merchandise, freight item category, BOGO (Buy One/Get One), or additional freight discount to eligible orders; • override the ship via on an order. Depending on your setup, the promotion you enter here might be automatically assigned to orders using the source code. See *Working with Promotions (WPRO)* for more information on setting up promotions and how the system determines whether to apply a promotion discount to an order. Alphanumeric, 7 positions; optional.

Field	Description
Offer	A code for a catalog, space, or television advertisement from which you accept orders. **Note:** To review all source codes for a particular offer, use the Source Codes option in *Working with Offers (WOFR)* to advance to the Work with Source Codes for Offer screen. This screen includes all the same options as the *Work with Source Codes Screen*. Alphanumeric, 3 positions; display-only.

Screen Option	Procedure
Create a source code	Select *Create* to advance to the *Create Source Code Screen (1 of 2)*.
Change a source code	Select *Change* for a source code to advance to the Change Source Code screens. For field descriptions, see *Create Source Code Screen (1 of 2)*. You can change any field on this screen except the source code.
Delete a source code	Select *Delete* for a source code to delete it. You can also delete a source code using *Initializing an Offer (MOFI)*. **Note:** You cannot delete a source code if there are open orders on the system with this source code.
Display a source code	Select *Display* for a source code to advance to the Display Source Code screens. You cannot change any fields on this screen. For field descriptions, see *Create Source Code Screen (1 of 2)*.
Define special pricing by source code	Select *Special pricing* for a source code to advance to the *Work with Special Source Price Screen*.
Define items as free gifts for a source code	Select *Free gifts* for a source code to advance to the *Work with Source Free Gifts Screen*.
Review sales history by source code	Select *History* for a source code to advance to the *Source Code History Screen*.
Define freight charges for a source code	Select *Freight charges* for a source code to advance to the *Work with Dollar Chart by Source Screen (Freight Charges)*.
Define service charges for a source code	Select *Service charges* for a source code to advance to the *Work with Dollar Chart by Source Screen (Service Charges)*.
Define dollar discounts for a source code	Select *Dollar discount* for a source code to advance to the *Work with Source Dollar Discounts Screen*.

Screen Option	Procedure
Copy freight charges from one source code to another	Select *Copy freight charges* for a source code whose freight charges you want to copy to advance to the *Copy Source Code Freight Charges Window*.
Work with user defined fields	Select *User field* for a source code to advance to the Work with User Fields Screen.

Create Source Code Screen (1 of 2)

Purpose: Use this screen to begin creation of a source code.

How to display this screen: Select *Create* on the *Work with Source Codes Screen*.

Field	Description
Source code	A unique, user-defined code to identify a segment of your customer base and to analyze sales. The source code drives marketing, pricing, freight, and service charge information on an order. Alphanumeric, 7 positions. Create screen: required. Change screen: display-only.
Description	The description of this source code. Alphanumeric, 30 positions; required.
Division	A unique code for a profit center or area of financial reporting. Division codes are defined in and validated against the Division table; see Working with Divisions (WDIV). Alphanumeric, 2 positions; required.
Offer	The code for the catalog, space, or television advertisement from which you accept orders. Offers are defined in and validated against the Offer table; see Working with Offers (WOFR). **Note:** If the Multi Currency by Offer (E03) system control value is set to *Y*, the system confirms that the division and the offer you select for a source code both point to the same currency. Alphanumeric, 3 positions; required.
Category	A code to categorize your source codes, such as buyers, recipients, or rented names. Source code categories are defined in and validated against the Source Code Category table. See Working with Source Categories (WSCT). Alphanumeric, 2 positions; optional.

Field	Description
Type	A code that specifies whether this source code should be used in the source code profit analysis calculations.

Valid values are:

1. *Known*
2. *Do not analyze*
3. *Unknown*

To total the sales on the Source Code Profit Analysis report, the system first calculates the percentage of the total sales for each type *K* source code. Sales for the type *U* source codes are then divided based on these percentages and added proportionately to the type *K* source codes. Type *N* (unknown) sales are not added.

The chart below illustrates how sales are calculated.

Source code	Type	Dollar	Percent
Raw Data:			
ABC100	K	300.000	33.000
ABC200	K	600.000	67.000
Subtotal sales	K	900.000	
ABC300	U	150	--
ABC400	U	150.000	--
ABC500	U	300.000	--
Subtotal sales	U	600.000	--
ABC600	N	175.000	--
Subtotal sales	N	175.000	--
Reported Data:			
ABC100	K	500.000	33.000
ABC200	K	1000.000	67.000
Total sales	K	1500.000	

In the table above, the sales for all type *K* source codes is 900.00. The percentage of total sales is 33% from source code ABC100 and 67% from source code ABC200.

The total sales for type *U* source codes is $600.00. 33% of type *U* sales ($200.00) is added to the sales from source code ABC100. 67% ($400.00) is added to the sales from source code ABC200.

The reported sales for sales from ABC100 becomes $500.00.

The reported sales from ABC200 becomes $1000.00.

The total type *K* reported sales becomes $1500.00.

Alphanumeric, 1 position; required.

Field	Description
Price method	A code that determines how the system prices items on orders using this source code. Valid values are: • *Use Item Cost* • *Regular Plus Reprice* • *No Charge* • *No Charge/No Cost* • *Regular Hierarchy* Each source code pricing method is described briefly below: **Use Item Cost** This pricing method uses the item's cost from the SKU table. Typically, this method is used for source codes established for employee sales or internal transfers of merchandise from warehouses to stores. This pricing method overrides any other pricing method. The item's cost is the price your company paid for the product. **Regular Plus Reprice** This is a header-level pricing method that uses the pricing hierarchy defined in the System Control table to determine the price on a line. When the price has been calculated, the system will reprice the line using any header-level discounts that may be in effect, such as Volume Discount Pricing. See Setting Up Order Entry Values. **No Charge** This pricing method indicates that items on orders with this source code will be given to the customer at “no charge,” but the cost of the item will be tracked to calculate the gross profit margin. For example, this pricing method may be used for source codes created to track external sales from stock liquidations.

Field	Description
	No Charge/No Cost This method indicates that items on orders with this source code will be given to the customer at no charge and the item cost will not be tracked. For example, this pricing method may be used for source codes created to track internal transfers of stock. **Reg Hierarchy** This is a line-level pricing method that uses the pricing hierarchy established in the System Control table to determine the item price. When the Best Way Pricing (A78) system control value is set to *N*, the system uses the first price it finds in the pricing hierarchy for the item. When this system control value is set to *Y*, the system searches through each level in the pricing hierarchy, finds a price at each level, and uses the best price for the item. **If You Do Not Use Repricing** If you do not use repricing during order entry, set the Price method for your source codes to *Regular Hierarchy* so that the system does not reprice the order. An error message displays if you select *Reprice* during order entry: `Repricing is not valid with current source price method`. By setting the Price method to *Regular Hierarchy*, you can eliminate repricing processing during order entry and improve order entry performance. Required.
Discount % (Discount percentage)	A discount for orders assigned to this source code. This discount does not apply to orders with a *Use Item Cost*, *No Charge*, or *No Charge/No Cost* pricing method, or to order lines with a price override reason code applied. This discount is applied in addition to any discounts resulting from other pricing methods. The discount is calculated during Order Entry or Order Maintenance. This discount applies only to items with a *Y* in the Discountable field in the Item or SKU table. Numeric, 5 positions with a 2-place decimal; optional.
Freight method	A code that determines how freight charges will be calculated for this source code. Order-level and line-level freight methods are below. See Freight Charges for a description of each freight method and set up instructions.

Order Methods	Line Methods
Dollar chart by offer	Flat rate by item
Dollar chart by source	Flat rate by quantity
Actual billing amount	Flat rate by item/source
Flat rate by ship-to	Item
Percentage by source	Weight
Percentage by ship via	State Shipping Matrix
Recipient	
By Offer Price	
By Order Weight	

Field	Description
	Order-level freight methods: *Dollar chart by offer* (*$ Chart by Ofr*): Allows you to charge freight based on the dollar amount of the merchandise ordered for each shipping address on an order. The dollar tier levels and the corresponding freight charges are defined for each offer. See Dollar chart by offer ($ Chart by Ofr) Freight for more information. *Dollar chart by source* (*$ Chart by Src*): Allows you to charge freight or service charges based on the dollar amount of the merchandise ordered for each shipping address on an order. The dollar tier levels and the corresponding freight or service charges are defined for each source code. See *Dollar chart by offer ($ Chart by Ofr) Freight* for more information. *Actual billing amount* (*Actual Bill Amt*): Uses the total weight of all the items on the order and the shipper to determine the actual freight charge during Confirmation or Billing. See Actual billing amount (Actual Bill Amt) freight for more information. *Flat rate by ship-to (Flat Rt/Ship To)*: Uses the flat freight fee defined for the source code *Flat freight rate* field) for the source code. See Flat rate by ship-to (Flat Rt/Ship To) freight for more information. *Percentage by source* (*% Source*): Multiplies the merchandise amount of the order by the percentage in the Freight% field for the source code. See *Percentage by source(%Source freight* for more information. *Percentage by ship via* (*% Ship Via*): Multiplies the merchandise amount of the order by the percentage in the Freight Percent field in the Ship Via table. See *Percentage by ship via ($ shipVia) freight* for more information. *Recipient*: Calculates freight by dollar based on the merchandise total of the order including all recipient orders. The Maximum number of ship to's field defined for the source code is checked. If the number of recipients on the order is less than or equal to this value, the Dollar Chart by Offer will determine the freight fee, based on the merchandise total. Once the maximum number of recipient orders is reached, the system includes a flat amount with the freight amount for each additional recipient order. See *Recipient freight* for more information. *Freight by offer price (By Offer Price):* Uses the Dollar Chart by Offer to calculate freight, based on the total merchandise value of the order. For this freight method, the merchandise value is calculated by adding the extended single-unit offer price for each item/SKU, disregarding any discounts, associate pricing, price overrides, quantity break pricing, etc. See *By Offer Price freight* for more information. *Freight by order weight (Order Weight):* This freight method is based on the total weight of the order and the number of cartons required to ship the order. See *Freight by order weight (Order Weight) freight* for more information.

Field	Description
	Line-level Freight Methods: *Flat rate by item* (*Flat Rt/Item*): Allows you to charge one freight amount per item, regardless of the quantity ordered of the item. The *Freight* is defined for each item in the associated Item Offer (default) or SKU Offer table. The freight total represents the accumulation of each item's flat freight fee. See *Flat rate by item (Flat Rt/Item) freight* for more information. *Flat rate by quantity* (*Flat Rt/Qty*): Allows you to charge a flat rate for a certain number of units ordered and add an additional charge for each unit thereafter. See *Flat rate by quantity (Flat Rt/Qty) freight* for more information. *Flat rate by item source* (*Flat Rt/Itm Src*): Uses a flat freight charge for each unit ordered multiplied by the number of units ordered. See *Flat rate by item source (Flat Rt/Itm Src) freight* for more information. *Item* (*By Item*): Uses the freight charge defined in the Item Offer record, multiplied by the quantity ordered. See *Item (By Item) freight* for more information. *Weight*: Uses the weight of each item (defined in the Item or SKU table) and the rate for the shipper. The weight of the item is multiplied by the quantity ordered to calculate the total weight for the order line. In order to determine the freight charge, the system references the associated rate chart for each line, based on the total weight and delivery zone. See *Weight freight* for more information. Required.
Flat amt (Flat amount)	A flat fee for freight, used in the following freight methods: • Flat Rate/Ship To (*F*) • Flat Rate/Quantity (*FQ*) • Flat Rate/Item Source (*FS*) • Recipient (*R*) Each freight method is described briefly below (see *Freight method* for more details): *Flat Rate/Ship To (F)*: This method uses the value in the Flat amt field in the Source Code table if any; otherwise, uses the flat fee defined for the Offer. The charge defined in the Flat amt field is used as the freight fee for orders assigned to this source code. *Flat Rate/Quantity (FQ)*: This method uses the Flat amt as the freight fee for a certain number of units on the order, and then an additional charge is added for each unit thereafter. *Flat Rate/Item Source (FS)*: This method uses the Flat amt multiplied by the quantity ordered. *Recipient (R):* This method includes the Flat amt in the freight bucket for any recipient added to an order that exceeds the number in the *Max shp tos-frt (Maximum ship to's, freight)* field. See *Recipient freight* for an example. Numeric, 13 positions with a 2 place decimal; optional.

Field	Description
Freight % (Freight percentage)	A percentage used to calculate freight on an order, based on the total merchandise amount on the order. Used in the Percentage by Source (PS) freight method. This method also considers the values in the Frt min and Frt max fields in the Source Code table. The system will limit the freight fee to the minimum or maximum amount you define if the results of the freight calculation exceed these values. **Note:** If the Include Handling in Freight Charge Calculation (D77) system control value is *selected*, the system will also include handling along with merchandise in the freight charge calculation. Numeric, 5 positions with a 2-place decimal; optional.
Secondary frt (Secondary freight)	Used in the Flat Rate/Quantity (*FQ*) freight method, in which you charge a flat rate for a certain number of units ordered and an additional charge for each unit thereafter. The calculation is: `Flat amt + ((Qty ord - Up to Frt qty) * Secondary frt)` The Flat amt and Up to frt qty fields are defined in the Source Code table. The secondary freight fee is added for each unit above the amount in the Up to frt qty field. Numeric, 13 positions with a 2-place decimal; optional.
Frt min (Freight minimum)	Used in the Percentage/Source (*PS*) freight method, in which the merchandise total is multiplied by the value in the Freight % field. **Note:** If the Include *Handling in Freight Charge Calculation (D77)* system control value is set to *Y*, the system will also include handling along with merchandise in the freight charge calculation. The system uses the freight charge in the Frt min field if the result of this calculation is less than the value in the Frt min field. Numeric, 13 positions with a 2-place decimal; optional.

Field	Description
Frt max (Freight maximum)	Used in the Percentage/Source (*PS*) freight method, in which the total merchandise amount on the order is multiplied by the value in the Freight % field. The system will use the freight charge in the Frt max field if the result of this calculation is greater than the value in the Frt max field. **Note:** If the *Include Handling in Freight Charge Calculation (D77)*system control value is set to *Y*, the system will also include handling along with merchandise in the freight charge calculation. Numeric, 13 positions with a 2-place decimal; optional.
Up to frt qty (Up to freight quantity)	Used in the Flat Rate/Quantity (*FQ*) freight method. This method enables you to charge a flat rate for a certain number of units ordered and add an additional charge for each unit thereafter. The calculation is: `Flat amt + ((Qty ord - Up to Frt Qty) * Secondary frt)` The values in the Flat amt, Up to frt qty and Secondary frt fields are defined in this table. The secondary freight fee will be included in this calculation when the quantity ordered exceeds the value in the Up to frt qty field. Numeric, 5 positions; optional.
Max shp tos-frt (Maximum ship to's, freight)	Used in the Recipient (*R*) freight method, which uses *Working with Dollar Chart by Offer (WDCO)* to determine the freight fee, based on the total merchandise dollars on the buyer's order. • If the number of recipients on the order is less than or equal to the value in the Max ship to's - frt field, the dollar chart freight fee will be used as the freight charge on the order. • For any recipient added to an order that exceeds the number in this field, the system includes the Flat amt in the freight bucket along with the dollar chart freight fee. **Note:** If the *Include Handling in Freight Charge Calculation (D77)* system control value is *Y*, the system will also include handling along with merchandise in the freight charge calculation. See *Recipient freight* for an example. Numeric, 3 positions; optional.

Field	Description
Freight table	Defines the freight table to use when using the freight by order weight (*OW*) freight method. See Working with Weight Tables for Order Weight (WFTB) for more information on working with freight tables. Alphanumeric, 3 positions; required if using freight by order weight.
Mail date	The date the offer was mailed to this list. You can enter this date manually. Numeric, 6 positions; optional.
House acct code (House account code)	Specifies whether this list was generated from your company's own “house” list or from a broker's rented list. Valid values are: • *House Account* • *In House* Optional.
Mktg proj (Marketing projection)	The total projected amount of responses (sales) for this source code. User-defined and informational only. Numeric, 13 positions with a 2 place decimal; optional.
Proj names (Projected names)	The broker's projected number of names that will be generated from this source code. Informational only. Numeric, 5 positions; optional.
Reqs mailed (Requests mailed)	The total number of catalog requests mailed to this source code. The system updates this field when you select the Catalog Request Printing option. Numeric, 7 positions; optional.
Net circ (Net circulation)	The number of names rented or generated for the mailing, after duplicate names have been removed. The calculation is: `Gross circulation - Duplicate names` Numeric, 7 positions; optional.
List source	Not currently implemented. Alphanumeric, 7 positions; optional.
List cost	The cost to purchase this list from the broker. Informational only. Numeric, 13 positions with a 2-place decimal; optional.
Gross circ (Gross circulation)	The total number of names rented or generated for the mailing, including duplicate names. Informational only. Numeric, 7 positions; optional.
B/E amount (Break even amount)	A value that allows you to analyze the cost of an offer. The calculation is: `Break even amount / Net circulation = Cost per offer` Numeric, 13 positions with a 2-place decimal; optional.
List broker	The code for this list broker who provided the list of names. This code is used for source codes assigned to rented lists and is informational only. Numeric, 3 positions; optional.

Field	Description
Drop code	The number assigned to the catalog mailing to this list of customers. Drop codes are assigned to each mailing; some customers may be included in several drops of the same catalog, to spread out circulation and encourage purchases. Alphanumeric, 2 positions; optional.
Promo code (Promotional code)	A code to group source codes together. In the hierarchy of the system, Promotion Codes fit between Source Codes and Offers. Reporting can be performed at the Promotion Code level. You can also set up a promotion to: • display a pop-up message in order entry; • apply a merchandise, freight item category, BOGO (Buy One/Get One), or additional freight discount to eligible orders; • override the ship via on an order. A pop-up message you specify for the promotion displays in order entry only if you enter the promotion code here. Also, if an order is qualified for more than one promotion of a certain type, the promotion code you enter here takes first priority. If you enter a promotion code in this field the Exclude promotion field must be *unselected* or an error message indicates: `Promotion not allowed with Exclude promotions set to Y`. See *Working with Promotions (WPRO)*. Alphanumeric, 7 positions; optional.
Cover code	A code for the catalog cover mailed to this source code (group of names). Alphanumeric, 2 position; optional.
B/O priority (Backorder priority)	Determines the backorder priority to default to orders with this source code, where: • *9* = highest priority • *0* = lowest priority The Evaluate Backorders program runs in the background and matches available inventory (received through P.O. Receiving, Inventory Transactions, or any process that increases the on-hand quantity of an item) to backorders. The backorder priority defined at the source code level does not affect Immediate Reservation. See Working with the EBO_ASYNC Job for more information on the Evaluate Backorders function. Numeric, 1 position, optional.

Field	Description
Flex pay code (Flexible payment code)	Represents a deferred or installment flexible payment option for orders with this source code. An error message similar to the following indicates if you enter a code in this field and also enter *Y* in the Exclude FPO field: `Flexible Payment Option and Exclude FPO both cannot be entered.` Flexible payment codes are defined in and validated against the Flexible Payment Option table. See Working with Flexible Payment Options (WFPO) for more information on deferred and installment payment plans. Alphanumeric, 5 positions; optional.
Con/Bus (Consumer/ Business)	Used in list segmentation that identifies the targets of the list as consumers or businesses. Informational only. Valid values are: • *Consumer* • *Business* Optional.
Price table	Represents a table containing repricing and premium information for orders with this source code. Price table codes are defined in and validated against the Price Table table. See *Working with Price Tables (WPTB)*. Alphanumeric, 5 positions; optional.
Display on O/E (Display in Order Entry)	Determines whether this source code appears when you prompt on the Source field during Order Entry/Maintenance or when entering a catalog request. Valid values are: • *selected* = The source code displays in the Select Source pop-up window • *unselected* = (default): The source code does not display in the Select Source pop-up window
Promo pricing (Promotional pricing)	Indicates whether orders for this source code are eligible for any of the promotional pricing methods, which define bonus items or discounts based on the order, the dollar amount of the order, the items ordered from the same price group, or specific items ordered. Promotional pricing is controlled by the order type used on the order. In the Order Type table you can suppress promotional pricing windows from appearing, for example, when entering mail or fax orders. See *Setting Up Pricing Information*. • *selected* = An order with this source code is eligible for promotional pricing. • *unselected* = An order with this source code is not eligible for promotional pricing.

Field	Description
Restricted	Restricts the use of a source code. Restricting a source code prevents it from being assigned to an order. This restriction is useful for identifying source codes you no longer use, but cannot delete since there are still open orders outstanding. Set to *N* when the source code is created. During Offer Initialization, you have the option to restrict all sources codes associated with a particular offer; the source codes you restrict are not copied to the offer being initialized. See *Initializing an Offer (MOFI)*. Valid values are: • *selected* = This source code cannot be used. • *unselected* = (default): This source code can be used.
Excl FPO (Exclude flexible payment option)	Determines whether the source code is excluded from deferred and installment payment plans. Valid values are: • *selected* = Exclude this source code from deferred and installment payment plans. If an order contains a source code that is excluded from deferred and installment payment plans, the entire order is excluded from the payment plan. An error message similar to the following indicates if you try to assign a payment plan to an order containing a source code that is excluded from a payment plan: `Order is not eligible for deferred/ installment billing plan.` • *unselected* = Do not exclude this item from deferred and installment payment plans. An error message similar to the following indicates if you do not select this field and also enter a code in the Flexible payment code field: `Flexible Payment Option and Exclude FPO both cannot be entered.` See Deferred/Installment Billing Overview for more information on deferred and installment payment plans.
Excl serv chg (Exclude service charges)	Indicates whether any service charges by ship via or guaranteed service charges by offer can be added to orders. • *selected* = Add ship via service charges and guaranteed service charge by offer to orders with this source code. • *unselected* = Do not add ship via service charges or guaranteed service charge by offer to orders with this source code. See Working with Ship Via Codes (WVIA) for information on establishing a service charge dollar chart for a shipper, and see *Working with Offers (WOFR)* for information on setting up a guaranteed service charge by offer. **Note:** This field does not control whether to add service charges by offer that you set up through a dollar chart.

Field	Description
Excl promotion (Exclude promotion)	Indicates if this source code is excluded from any promotions you create using the *Work with Promotions (WPRO)* menu option. You may want to exclude a source code from promotions if you want to establish a promotion by offer, but exclude certain source codes. Valid values: • *selected* = Exclude this source code from promotions. • *unselected* (default) = Include this source code in promotions if the source code qualifies. If you select this field, you cannot enter a promotion code in the Promotion code field or an error message indicates: `Promotion not allowed with Exclude promotions set to Y.` If you select this field, you receive an error message if you enter this source code in the Qualifying source field on the *Create Promotion Screen* or Change Promotion Screen: `Source code flagged to exclude promotions.` **Note:** You can only exclude promotions created using the Work with Promotion Values menu option. This field does not apply to promotions created using the Work with Promotional Pricing (WPRP) menu option. See *Working with Promotions (WPRO)* for more information on setting up promotions.
Pop up wind msgs (Pop up window messages #1 - #4)	Use these fields to enter messages that display in Order Entry automatically for orders using this source code. You may enter up to 4 short messages for this source code. Pop-up window messages appear in Order Entry only if the order type allows promotional pricing windows. For example, you can suppress messages from displaying when entering mail or fax orders. If you set up promotional windows, using options on the Pricing menu, these source code-related windows appear before the promotional pricing windows. If you set up customer informational windows in the Customer table, these windows appear before the source code windows. Alphanumeric, 30 positions each line; optional.

Create Source Code Screen (2 of 2)

How to display this screen: Select *OK* on the *Create Source Code Screen (1 of 2)*.

Field	Description
Source code	Displays the new source code, which is used to identify a segment of your customer base and analyze sales. The source code drives marketing, pricing, freight, and service charge information on an order. Alphanumeric, 9 positions; display-only.
% net fill (Percent net fill)	The percent of goods actually shipped for this source code, after cancels and returns. Numeric, 5 positions with a 2-place decimal; optional.
% margin (Percent margin)	The profit margin for this source code, expressed as a percentage. The calculation is: `Retail price - Cost of goods sold` Numeric, 5 positions with a 2-place decimal; optional.
Cost per order	The operations expense associated with taking an order for this source code. Numeric, 13 positions with a 2-place decimal; optional.
Recency code	Not currently implemented. Alphanumeric, 4 positions; optional.
Variable ad expense (Variable advertising expense)	The cost of producing and mailing a catalog. Numeric, 13 positions with a 2-place decimal; optional.
User def % fld (User defined percentage field)	A field for you to enter a percentage for your own usage, such as for entry of a commission rate for the source code. You can use this field for reporting or querying purposes. Numeric, 5 positions with a 2-place decimal; optional.
Warranty required	Defines whether the system displays the Customer Warranty Information screen in order entry and order maintenance. The Customer Warranty Information screen is used to enter warranty information for a warranty product on the order. See Working with Customer Warranty Information (WCST). Valid values are: • *selected* = The system displays the Customer Warranty Information screen in order entry and order maintenance. • *unselected* = The system does not display the Customer Warranty Information screen in order entry and order maintenance.
Employee discount	Defines whether this source code is used for employee orders. Informational only. • *selected* = The source code is used for employee orders. • *unselected* = The source code is not used for employee orders.

Field	Description
Bypass credit check	Indicates whether orders containing this source code bypass the credit check process. Valid values are: • *selected* = Orders containing this source code bypass credit check. The system writes a message to order transaction history indicating that credit checking was bypassed. • Note: Orders that bypass credit checking are still eligible for credit card authorization. • *unselected* = Orders containing this source code do not bypass credit check. If a user does not have authority to the Maintenance of Bypass Credit Check Field in Source Code File (A87) secured feature, an error message similar to the following indicates if the user tries to change the value defined in this field: Unauthorized to change Credit Check flag.
User fields 1-6	Six extra fields for you to enter additional information about this source code. You can use these fields for reporting or querying purposes. Alphanumeric, 30 positions; optional.

Work with Special Source Price Screen

Purpose: Use this screen to define special pricing for an item that is ordered from this source code. The system applies the item discount automatically when the customer orders an item in the required quantity from this source code. You can define discounted prices for regular customers and associate customers. No pop-up window appears in Order Entry to inform the customer of this discount; however, the system updates the order line with **Special Source Price* as the pricing method.

> **Note:**
>
> To enter multiple item special prices by source code, you can also use *Working with Special Pricing by Source Code (WSPP)*.

Uploading special source prices from an external system: You can also upload special source price records from an external system; see *Work with Pricing Upload (WPUP)* for an overview.

Related system control values:

- If the Perform Source Pricing Validation (D62) system control value is *selected* and there are any source special pricing records set up for the source code on the order header, the system prevents you from adding any items to the order if they are not included in the special source pricing.
- The Pricing Values (B31) system control value controls the order in which the system evaluates pricing options for the order, based on the priority assigned to the Special by Source Sequence # (A82) system control value.

How to display this screen: At the Work with Source Codes Screen, select *Special pricing* for a source code.

Field	Description
Item	An item that is eligible for special source pricing. Alphanumeric, 12 positions; optional.
Qty (Quantity)	The quantity of the item that must be purchased to receive the special price. Numeric, 5 positions; optional.
Price	The price at which the item will be sold if quantity and source code requirements are met Numeric, 13 positions with a 2-place decimal; optional.
Assoc price (Associate price)	The price at which the item will be sold to associate customers if quantity and source code requirements are met. Numeric, 13 positions with a 2-place decimal; optional.
Tax inclusive price	The price at which the item will be sold to customers if the order is subject to VAT and if the quantity and source code requirements are met. Displayed only if the Tax Included in Price (E70) system control value is *selected*. Numeric, 13 positions with a 2-place decimal; optional.
Tax-inclusive associate price	The price at which the item will be sold to associate customers if the order is subject to VAT and if the quantity and source code requirements are met. Displayed only if the *Tax Included in Price (E70)* system control value is *selected*. Numeric, 13 positions with a 2-place decimal; optional.

Screen Option	Procedure
Create an item special price by source record	Select *Create* to advance to the *Create Special Source Price Screen*.
Change an item special price by source record	Select *Change* for an item to advance to the Change Special Source Price screen. For field descriptions, see *Create Special Source Price Screen*. You can change only the price fields.
Delete an item special price by source record	Select *Delete* for an item to delete special source pricing.
Display an item special price by source record	Select *Display* for an item to advance to the Change Special Source Price screen. You cannot change any fields on this screen. For field descriptions, see *Create Special Source Price Screen*.

Create Special Source Price Screen

Purpose: Use this screen to create a special source price for a source code.

How to display this screen: Select *Create* at the *Work with Special Source Price Screen*.

Field	Description
Source	A unique user-defined code assigned to a group of customer names that make up a mailing list for an offer or advertisement. Alphanumeric, 9 positions; display-only.

Field	Description
Item	A code that represents a unit of inventory. Item codes are defined in and validated against the Item table. **Note:** If this item has SKUs, the prices defined here will apply to all SKUs associated with this item. Alphanumeric, 12 positions. Create screen: required. Change screen: display-only.
Quantity	The quantity of the item that the customer must purchase to receive this price break. Numeric, 5 positions. Create screen: required. Change screen: display-only.
Price	The selling price of the item when an order meets the defined source code and quantity requirements. This price applies to all SKUs of the item on the order. Numeric, 13 positions with a 2-place decimal; required.
Tax inclusive price	The selling price of the item when an order meets the defined source code and quantity requirements and the order is subject to VAT. This price applies to all SKUs of the item on the order. Displayed only if the Tax Included in Price (E70)system control value is *selected*. Numeric, 13 positions with a 2-place decimal; optional.
Assoc price (Associate price)	The selling price of this item when an order meets the defined source code and quantity requirements and the customer is an associate. Customers are eligible for associate price breaks if they are identified as associate customers in the Customer table and if Assoc = *Selected* in Order Entry. Numeric, 13 positions with a 2-place decimal; optional.
Tax inclusive associate price	The selling price of this item when an order meets the defined source code and quantity requirements, the customer is an associate, and the order is subject to VAT. Customers are eligible for associate price breaks if they are identified as associate customers in the Customer table and if Assoc = *Selected* in Order Entry. Displayed only if the *Tax Included in Price (E70)*system control value is *selected*. Numeric, 13 positions with a 2-place decimal; optional.

Work with Source Free Gifts Screen

Free gifts applied when? In order entry, the system determines if the order is eligible for the free gift during repricing, the initial order accept, and the final order accept; if the order is eligible for the free gift, the system applies it to the order. See Applying Free Gifts.

Price override: The system uses the Default Price Override Reason (B35) system control value to add the free gift at no charge.

Things to note: The following factors influence how the system adds free gifts to the order:

- *Offer price or selling price?* To evaluate whether an order qualifies for a free gift, the system compares the total merchandise dollar value after applying any discounts or repricing (that is, the extended selling price of all items) with the $ required specified for the free gift.
- *Multiple gifts?*
  - If the Allow multiple gifts flag is *selected*, the system adds the free gift defined for each dollar threshold met by the order total. For example, if a free gift is defined for an order total of $10.00, $15.00, and $20.00 and the customer orders $30.00 worth of merchandise, the system will add the free gifts for a $10.00, $15.00, and $20.00 order.
  - If the Allow multiple gifts flag is *unselected*, the system adds the free gift defined for the highest dollar threshold met by the order total. For example, if a free gift is defined for an order total of $10.00, $15.00, and $20.00 and the customer orders $17.50 worth of merchandise, the system will add the free gift defined for a $20.00 order, because this is the highest level for which the order qualifies.
- *Source vs. offer free gifts:* You can also set up free gifts at the offer level using the *Work with Offer Free Gifts Screen*; however, free gifts by source code override free gifts by offer. If an order would qualify for both the offer and source code free gifts, only the source code's free gift is added to the order.

How to display this screen: Select *Free gifts* for a source code at the *Work with Source Codes Screen.*

Field	Description
Source code	The unique user-defined code for the source and description of the source code. (Source) Alphanumeric, 9 positions; display-only. (Description) Alphanumeric, 30 positions; display-only.
Allow multi gifts? (Allow multiple gifts?)	Indicates if a customer can receive more than one free gift on an order. • *Selected* = Apply more than one free gift on an order if the order qualifies. • *Unselected* = Apply only free gift with the highest dollar level for which the order qualifies.
$ Required (Dollars required)	The merchandise dollar amount required on an order for the customer to be eligible for the free gift. You must enter a dollar amount of `$0.01` or higher. You cannot enter a negative amount. Numeric, 13 positions with a 2-place decimal; required.
Item	The item to add as a free gift. Alphanumeric, 12 positions; required.
SKU (Stock keeping unit)	If the specified item has SKUs, enter the SKU to add to qualifying orders. Alphanumeric, three 4-position fields; required if the item has SKUs.

Field	Description
Qty (Quantity)	The number of units of the free gift item to add to the order. Numeric, 5 positions; required.

Source Code History Screen

Purpose: Use this screen to review life-to-date totals for orders, sales, cancellations, returns, exchanges, and soldouts with this source code, and to review life-to-date averages for dollars per book and average order value. The fields on this screen are updated by the system; you cannot change any of these fields.

How to display this screen: On the *Work with Source Codes Screen,* selecting *History* for a source code. You can also advance to this screen by selecting *History* on the *Change Source Code screen.*

Field	Description
Source code	A code used to identify a segment of your customer base. Alphanumeric, 9 positions; display-only.
First order date	The date the first order was placed against this source code. Numeric, 6 positions (in user date format); display-only.
Last order date	The date of the most recent order for this source code. Numeric, 6 positions (in user date format); display-only.
Response % (Response percentage)	The percentage of response from this source code. If you have received orders from this source code, the calculation is: `Orders / Net circulation` If you have not received orders from this source code, the calculation is: `# of catalog requests mailed / Net circulation` The net circulation value in both calculations is described in the next field. Numeric, 5 positions with a 2 place decimal; display-only.
Net circulation	The number of names rented from another company or generated from your own customer base (house list) for the catalog mailing, after duplicate names have been removed. This total includes customers who received catalogs because they requested them. The calculation is: `Gross circulation - Duplicate names` Numeric, 7 positions; display-only.

Field	Description
Requests mailed	The total number of responses by this source code to an offer. The Catalog Request Print program updates this field when you use ***PCAT*** *Processing Catalog Requests (PCAT).* This number reflects the total number of requests rather than the number of copies; for example, if a customer requests 3 copies of a catalog, the system increases the Requests mailed by 1, not 3. When you reset the Printed flag at the Change Catalog Request Screen in order to reprint the catalog request label, the system decreases this total. When you reprint the label, the system increases this total again. Numeric, 7 positions; display-only.
Dollars per book	Average value of orders per catalog distributed. The calculation is: `Total dollar value of orders / Net Circulation` Numeric, 20 positions with a 2-place decimal; display-only.
Avg $ ordered (Average dollars ordered)	The average value of an order. The calculation is: `Total dollars for orders/ Total orders` Numeric, 20 positions with a 2-place decimal; display-only.
These fields contain life-to-date totals:	
Orders # (Number of orders)	The total number of orders for this source code, including orders which include only sold out items or non-inventory items. This total does not include: • batch orders that have not yet been accepted. Once the batch has been accepted, the system updates the total number of orders by the number of orders in the batch for this source code. • returns processed by negative quantities in order entry. • order lines added to an existing order through order maintenance, regardless of the setting of the Update Demand for Order Maintenance Transactions (C72) system control value. If an order includes more than one ship-to address, the entire order is considered one order. For example, an order with two ship to addresses updates the number of orders total by 1. If the source code on all order detail lines is overridden to a different source code than the one on the order header, the orders are included in the total number of orders for the detail-level source code. Numeric, 7 positions; display-only.

Field	Description
Orders $ (Order dollars)	The total amount of all items ordered for this source code, including: • the merchandise dollar total of soldout items or non-inventory items. • the merchandise dollars for items added to an exiting order through order maintenance if the *Update Demand for Order Maintenance Transactions (C72)* system control value is *selected*. This total does not include: • merchandise dollars for items returned during order entry. • merchandise dollars for batch orders that have not yet been accepted. • merchandise dollars for items added to an existing order through order maintenance if the *Update Demand for Order Maintenance Transactions (C72*) system control value is *unselected*. If the source code on all order detail lines is overridden to a different source code than the one on the order header, the order dollars are included in the total for the detail-level source code. Numeric, 20 positions with a 2-place decimal; display-only.
Sales # (Number of sales)	The number of shipments for this source code, including: • shipments confirmed; the system updates the number of sales for each confirmed shipment. • non-inventory items confirmed during billing. • orders that are expressed billed. This total is not decreased by returns or exchanges. Numeric, 7 positions; display-only.
Sales $ (Sales dollars)	The merchandise total of shipped items for this source code, including: • shipments confirmed; the system updates the dollar total as each confirmed shipment. • non-inventory items confirmed during billing. • dollars on orders that are expressed billed. This total does not include dollars for returns processed in order entry. Numeric, 20 positions with a 2-place decimal; display-only.
Cancels # (Number of cancellations)	The number of orders cancelled (orders in *Cancelled* status; all order lines have been cancelled) for this source code. **Note:** The system only increments this number for orders cancelled with a cancel reason code whose Reduce demand field is *unselected*. Numeric, 7 positions; display-only.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Cancels $ (Dollars canceled)</td><td>The merchandise total of orders cancelled (orders in Cancelled status; all order lines have been cancelled) for this source code.

Note:
The system only increments this number for orders cancelled with a cancel reason code whose Reduce demand field is unselected.

Numeric, 20 positions with a 2-place decimal; display-only.</td></tr>
<tr><td>Returns # (Number of returns)</td><td>The total number of return transactions processed and credited for this source code.
You can enter a return in:
• order entry (via negative quantity ordered)
• order maintenance
• Work with Return Authorizations (this total increases only when you process the credit)
This total includes simple returns only, as opposed to exchanges.
Numeric, 7 positions; display-only.</td></tr>
<tr><td>Returns $ (Return dollars)</td><td>The merchandise total of return transactions processed and credited for this source code.
You can enter a return in:
• order entry (via negative quantity ordered)
• order maintenance
• Work with Return Authorizations (this total increases only when you process the credit)
This total includes simple returns only, as opposed to exchanges.
Numeric, 20 positions with a 2-place decimal; display-only.</td></tr>
<tr><td>Exchanges # (Number of exchanges)</td><td>The total number of exchange transactions processed for this source code.
You can enter an exchange in:
• order maintenance
• Work with Return Authorizations (this total increases only when you process the credit)
Numeric, 7 positions; display-only.</td></tr>
<tr><td>Exchanges $ (Exchange dollars)</td><td>The merchandise total of returned items on exchange transactions processed for this source code.
You can enter an exchange in:
• order maintenance
• Work with Return Authorizations (this total increases only when you process the credit)
Numeric, 20 positions with a 2-place decimal; display-only.</td></tr>
</table>

Field	Description
Soldouts # (Number of soldouts)	The total number of items sold out for this source code. The total number of soldout orders, including orders for which all order lines are soldout, or at least one order line is soldout and all other order lines have been cancelled using any cancel reason code. This does not include order lines that are sold out if other order lines exist on the order that are not sold out or cancelled. The system considers an order line sold out if you process soldout order lines in order entry, order maintenance, or the Processing Auto Soldout Cancellations (MASO) menu option. Numeric, 7 positions; display-only.
Soldouts $ (Soldout dollars)	The merchandise total of items sold out for this source code. The system considers an order line sold out if you process soldout order lines in order entry, order maintenance, or the Processing Auto Soldout Cancellations (MASO) menu option. Numeric, 20 positions with a 2-place decimal; display-only.

Work with Source Dollar Discounts Screen

Purpose: Use the Work with Source Dollar Discounts screen to define standard and associate discounts for a source code.

Negative additional charge or prorate? If the Prorate Dollar Discounts and Coupons (D90) system control value is *unselected*, these discounts are added to the order as an additional charge, or credit. If this system control value is *selected*, the dollar discount is applied on a pro-rata basis to each item on the order and is reflected in the selling price. This discount will be determined after all other discounts have been applied; it applies regardless of the Pricing method defined in the Source Code table.

Applied when? In order entry, the system determines if the order is eligible for the source dollar discount during repricing, the initial order accept, and the final order accept; if the order is eligible for the source dollar discount, the system applies it to the order.

Discount sale items? The Exclude Sale Item When Prorating Discounts (I65) system control value controls whether to include sale items in the pro-rata discount calculation. See that system control value for more information.

How to display this screen: At the *Work with Source Codes Screen,* select *Dollar discounts* for the source code you want to work with.

Field	Description
Source	The code and description for a segment of your customer base to whom you mail an offer. (Source) Alphanumeric, 9 positions; display- only. (Description) Alphanumeric, 30 positions; display-only.

Field	Description
Merch amount (Merchandise amount)	The merchandise dollar amount required to be eligible for the discount. When evaluating an order to see if it meets the required merchandise total, the system includes sale items (based on the setting of the Sale item flag for the Item Offer or the *Sale item* flag for the SKU Offer) but does not include non-discountable items (based on the setting of the Discountable flag for the item). Numeric, 13 positions with a 2-place decimal; required.
Standard discount	The dollar amount of the discount subtracted from the merchandise total on the order if the order is eligible for the source discount. Numeric, 13 positions with a 2-place decimal; optional.
Associate discount	The dollar amount of the discount subtracted from the merchandise total on the order if: • the order is eligible for the source discount, and • the customer is identified as an associate customer (Associate = *Selected* in the Customer table) Numeric, 13 positions with a 2-place decimal; optional.
Add'l code (Additional charge code)	A code that identifies why the discount was applied to the order. The system uses this code only if the Prorate Dollar Discounts and Coupons (D90) system control value is *unselected*. Additional charge codes are defined in and is validated against the Additional Charges Code table; see Establishing Additional Charge Codes (WADC). This table contains codes to categorize the different types of charges or credits that may be added to an order. If the *Prorate Dollar Discounts and Coupons (D90)* system control value is *selected*, the system does not use the additional charge code; instead, the discount amount is prorated against the order lines, as described in Prorating Logic. Alphanumeric, 2 positions; required if the *Prorate Dollar Discounts and Coupons (D90)* system control value is unselected.

Adding, Changing, and Deleting Dollar Discounts

To add: Initially, this screen displays in *Add* mode with the cursor in the Merch amount field.

A pop-up window appears automatically if you add a dollar discount without entering an additional charge code and the Prorate Dollar Discounts and Coupons (D90) system control value is *unselected*. *Select* the appropriate additional charge code, such as *D* = Dollar Discount.

To change: Any existing dollar discounts for this source code display on the screen in *Change* mode. To update a dollar discount or to review these records, select *Change* to switch to Change mode.

To delete: Select *Change* to switch to *Change* mode and display the discounts for this source code and select *Delete* for a dollar discount to delete it.

Copy Source Code Freight Charges Window

Purpose: Use this window to copy the freight dollar chart charges from one source code to another.

How to display this window: Select *Copy freight charges* for a source code whose freight charges you want to copy. The source code you select must have freight charges already set up, and the *Freight method* for the source code must be *$ Chart by Src*, or the system displays the following message:

Freight method is not Dollar Chart.

See *Work with Dollar Chart by Source Screen (Freight Charges)* for information on how to set up and work with freight charges for a source code.

Completing this screen: Enter the source code to which you would like to copy the freight charges. The source code you enter must also have a freight method of *$ Chart by Src*, or the system displays the following message:

Freight method is not Dollar Chart.

Also, if the target source code already has freight charges defined, the system displays the following message:

Source already has freight charges defined.

Select *OK* at the Confirm prompt to complete the copy.

Working with Dollar Chart by Offer (WDCO)

Purpose: You can use the Work with Dollar Chart by Offer function to establish freight or service charges by offer.

Service charges are additional charges that are added to an order if the merchandise amount on the order is equal to or exceeds an amount specified in this table. Service charges can also be defined at the source code level.

You can also define freight and service charges for an offer using *Working with Offers (WOFR)*.

> **Note:**
>
> - If you plan to set up service charges, you should complete the *Addl charge code (for Dollar chart charges)* in the Offer table.
> - The *Excl serv chg (Exclude service charges)* flag for the source code does not control whether to apply service charges you set up through these screens to orders.

In this topic:

- *First Work with Dollar Chart by Offer Screen (Select Offer and Type)*
- *Work with Dollar Chart by Offer Screen (Freight Charges)*
- *Create Dollar Chart by Offer Screen (Freight Charges)*
- *Work with Dollar Chart by Offer Screen (Service Charges)*
- *Create Dollar Chart by Offer Screen (Service Charges)*

First Work with Dollar Chart by Offer Screen (Select Offer and Type)

How to display this screen: Enter *WDCO* in the Fast path field on a menu or select this option from a menu.

Field	Description
Offer	Enter the code for the offer for which you want to set up a freight or service charge. An offer is a code that identifies the catalog, space, or television advertisement from which you accept orders. Offers are defined in and validated against the Offer table; see *Working with Offers (WOFR)*. Alphanumeric, 3 positions; required.
Freight or service	Enter *F* if you want to set up a freight charge for this offer, or Enter *S* if you want to set up a service charge for this offer. Alphanumeric, 1 position; required.

Completing this screen: Complete the Offer field and enter either *F* or *S* in the Freight or service field.

- If you enter *F*, you advance to the Work with Dollar Chart by Offer Screen (Freight Charges).
- If you enter *S*, you advance to the Work with Dollar Chart by Offer Screen (Service Charges).

Work with Dollar Chart by Offer Screen (Freight Charges)

Purpose: Use this screen to work with freight charges for this offer. The screens and fields you use to work with freight and service dollar charts are nearly identical.

How to display this screen: Complete the *First Work with Dollar Chart by Offer Screen (Select Offer and Type)*. You can also display this screen by selecting *Freight charges* for an offer on the *Work with Offers Screen*.

Field	Description
Offer	The unique code and description for the catalog, space, television advertisement or web site from which you accept orders. Offer: Alphanumeric, 3 positions; display-only. Description: Alphanumeric, 3 positions; display-only.
Dollar amount	The total dollar amount on the customer's order that is subject to freight charges. This amount includes all merchandise on the order; if the ***SETTING UP ORDER ENTRY VALUES*** *Include Handling in Freight Charge Calculation (D77)* system control value is *selected*, then handling is also included. When this total is equal to or greater than the dollar amount defined here, the system applies the freight charge from the *Freight charge* field, the *Pct (Percentage)* field, or the *Maximum charge* field to the customer's order. You can define a dollar amount where the system stops charging freight by entering a $0.00 freight charge in the *Freight charge* or *Pct (Percentage)* fields. This is helpful if you wish to stop charging freight when a customer reaches a certain merchandise level on the order. Numeric, 13 positions with a 2-place decimal; optional.
Freight charge	The flat dollar amount of freight to apply to a customer's order when the order total subject to freight is equal to or greater than the amount from the *Dollars (amount)* field. Numeric, 13 positions with a 2-place decimal; optional.

Field	Description
Pct (Percentage)	The percentage of freight to charge when the order total subject to freight is equal to or greater than the amount from the *Dollars (amount)* field. Numeric, 5 positions with a 2-place decimal; optional.
Maximum charge	The maximum dollar amount of freight that can be charged, regardless of the result of the freight calculation. Numeric, 13 positions with a 2-place decimal; optional.

Screen Option	Procedure
Create a dollar chart	Select *Create* to advance to the *Create Dollar Chart by Offer Screen (Freight Charges)*.
Change a dollar chart	Select *Change* for a dollar chart to advance to the Change Dollar Chart by Offer screen. See *Create Dollar Chart by Offer Screen (Freight Charges)* for field descriptions. You can change all of the information except the Offer code field.
Delete a dollar chart	Select *Delete* for a dollar chart to delete it.
Display a dollar chart	Select *Display* for a dollar chart to advance to the Display Dollar Chart by Offer screen. You cannot change any fields on this screen. For field descriptions, see *Create Dollar Chart by Offer Screen (Freight Charges)*.

Create Dollar Chart by Offer Screen (Freight Charges)

Purpose: Use this screen to create a freight dollar chart for an offer.

How to display this screen: Select *Create* on the *Work with Dollar Chart by Offer Screen (Freight Charges)*.

Field	Description
Offer	The unique code and description for the catalog, space or television advertisement or web site from which you accept orders. See *Working with Offers (WOFR)*. Offer: Alphanumeric, 3 positions; display-only. Description: Alphanumeric, 3 positions; display-only.

Field	Description
Dollars (amount)	The dollar amount on the customer's order that is subject to freight. This amount includes the merchandise total; it also includes any handling charges on the order if the Include *Handling in Freight Charge Calculation (D77)* system control value is *selected*. When the total amount subject to freight on an order is equal to or greater than the dollar amount you define here, the system applies the freight charge defined in the *Freight amount* field, the *Freight percent* field, or the *Maximum freight amount* field to the customer's order. You can define a dollar amount where the system stops charging freight by entering a $0.00 freight charge in the *Freight amount* or *Freight percent* fields. This is helpful if you wish to stop charging freight when a customer reaches a certain merchandise level on the order. Numeric, 13 positions with a 2-place decimal. Create screen: required. Change screen: display-only.
Freight amount	Enter the freight charge to apply to a customer's order when the order total subject to freight is equal to or greater than the amount from the *Dollars (amount)* field. *Example:* If you enter 100.00 in the *Dollars (amount)* field, and 4.95 in the *Freight amount* field, the system adds $4.95 to the order as freight when the total amount subject to freight is $100.00 or less. Numeric, 13 positions with a 2-place decimal; optional.
Freight percent	Enter the percentage to use to calculate freight. The system multiplies this percentage by the total amount on the order subject to freight. *Example:* If you enter 50.00 in the *Dollars (amount)* field, and 5.00 in the *Freight percent* field, the system applies $2.50 to the order as freight when the total amount subject to freight is $50.00 or less. Numeric, 5 positions with a 2-place decimal; optional.
Maximum freight amount	The maximum dollar amount of freight to charged, regardless of the result of the freight calculation. You need to complete this field only if you are calculating freight by percentage (if you have entered a percentage in the Pct field.) Numeric, 13 positions with a 2-place decimal; optional.

Work with Dollar Chart by Offer Screen (Service Charges)

Purpose: Use this screen to work with service charges for this offer. The screens and fields you use to work with freight and service dollar charts are nearly identical.

How to display this screen: Complete the *First Work with Dollar Chart by Offer Screen (Select Offer and Type)*. You can also advance to this screen by selecting *Service charges* for an offer at the *Work with Offers Screen*.

Field	Description
Offer	The unique code and description for the catalog, space, or television advertisement from which you accept orders. Offer: Alphanumeric, 3 positions; display-only. Description: Alphanumeric, 3 positions; display-only.
Dollar amount	The merchandise dollar amount on the customer's order. When the merchandise total is equal to or greater than the dollar amount you enter, the system applies service charge defined in the *Service amount* field, the *Service percent* field, or the *Maximum service amount* field to the customer's order. You can define a dollar amount where the system stops charging a service charge by entering a $0.00 service charge in the *Service amount* or *Service percent* fields. This is helpful if you wish to stop charging a service charge when a customer reaches a certain merchandise level on the order. Numeric, 13 positions with a 2-place decimal; optional.
Service charge	The flat dollar amount of service to apply to a customer's order when the merchandise dollar amount on the order is equal to or greater than the amount defined in the *Dollars (amount)* field. Numeric, 13 positions with a 2-place decimal; optional.
Pct (Percentage)	The percentage of the merchandise total to apply to a customer's order as service charge when the merchandise dollar amount on the order is equal to or greater than the amount defined in the *Dollars (amount)* field. Numeric, 5 positions with a 2-place decimal; optional.
Maximum charge	The maximum dollar amount of service charge to add to an order, regardless of the result of the freight calculation. Numeric, 13 positions with a 2-place decimal; optional.

Screen Option	Procedure
Create an offer	Select *Create* to advance to the *Create Dollar Chart by Offer Screen (Service Charges)*.
Change an offer	Select *Change* for a dollar chart to advance to the Change Dollar Chart by Offer screen. For field descriptions, see *Create Dollar Chart by Offer Screen (Service Charges)*. You can change all of the information except the Offer code field.
Delete an offer	Select *Delete* for a dollar chart to delete it.
Display an offer	Select *Display* for a dollar chart to advance to the Display Dollar Chart by Offer screen. You cannot change any fields on this screen. For field descriptions, see *Create Dollar Chart by Offer Screen (Service Charges)*.

Create Dollar Chart by Offer Screen (Service Charges)

Purpose: Use this screen to create a service dollar chart for an offer.

How to display this screen: Select *Create* at the *Work with Dollar Chart by Offer Screen (Service Charges)*.

This screen requires that you define a service charge by entering a dollar amount in the *Service amount* field or a percentage in the *Service percent* field, which the system will calculate on the merchandise total. Optionally, you can enter a maximum charge to as a cap, if the percentage you define results in a dollar amount that is greater than the maximum charge.

Field	Description
Offer	The unique code and description for the catalog, space, or television advertisement from which you accept orders. See *Working with Offers (WOFR)*. Offer: Alphanumeric, 3 positions; display-only. Description: Alphanumeric, 3 positions; display-only.
Dollars (amount)	The merchandise dollar amount of the customer's order. When the merchandise total is equal to or greater than the dollar amount you enter, the system applies the service charge defined in the *Service amount* field, the *Service percent* field, or the *Maximum service amount* field to the customer's order. *Example:* If the merchandise total is between and including .01 and 30.99, the customer will be charged 2.95. If the merchandise total is between and including 51.00 and 90.99, the charge will be 5.95. If the merchandise total is 200.00 or over, the charge will be 5 percent of the merchandise total, but not greater than 30.00. You can define a dollar amount where the system stops charging a service charge by entering a $0.00 service charge in the *Service amount* or *Service percent* fields. This is helpful if you wish to stop charging a service charge when a customer reaches a certain merchandise level on the order. Numeric, 13 positions with a 2-place decimal. Create screen: required. Change screen: display-only.
Service amount	The flat dollar amount of the service charge to apply to a customer's order when the merchandise amount on the order is equal to or greater than the amount defined in the *Dollars (amount)* field. Numeric, 13 positions with a 2-place decimal; required if you did not define a percentage in the Pct field.
Service percent	The percentage of the merchandise total to apply to a customer's order as a service charge when the merchandise dollar amount on the order is equal to or greater than the amount defined in the *Dollars (amount)* field. Numeric, 5 positions with a 2-place decimal; required if you did not define a dollar amount in the Service charge field.
Maximum service amount	The maximum dollar amount of the service charge to apply, regardless of the result of the service charge calculation. You need to complete this field only if you are calculating service charges on the merchandise dollar amount by percentage (if you have entered a percentage in the *Service percent* field.) Numeric, 13 positions with a 2-place decimal; required.

Working with Dollar Chart by Source Code (WDCS)

Purpose: Use the Work with Dollar Chart by Source Code function to establish and exclude freight or service charges by source code.

Service charges are additional charges that are added to an order if the merchandise amount on the order is equal to or greater than an amount specified in this table.

You can also define freight and service charges for a source using the Work with Source Code menu option; see *Working with Source Codes (WSRC)*.

> **Note:**
>
> If you plan to establish service charges, you should complete the *Addl charge code (for Dollar chart charges)* in the Offer table.

In this topic:

- *First Work with Dollar Chart by Source Screen (Select Source and Type)*
- *Work with Dollar Chart by Source Screen (Freight Charges)*
- *Create Dollar Chart by Source Screen (Freight Charges)*
- *Work with Dollar Chart by Source Screen (Service Charges)*
- *Create Dollar Chart by Source Screen (Service Charge)*

First Work with Dollar Chart by Source Screen (Select Source and Type)

How to display this screen: Select the Work with Dollar Chart by Source option from a menu or enter *WDCS* in the Fast path field at the top of any menu.

Field	Description
Source	A code to identify a segment of your customer base. Alphanumeric, 9 positions; required.
Freight or service	Indicates the type of dollar chart for the source code. Valid values are: *Freight* = Set up freight charges for the source code *Service* = Set up service charges for the source code Required.

Completing this screen: Complete the Source field and enter *F* or *S* in the Freight or service field. If you select *Freight*, you advance to the *Work with Dollar Chart by Source Screen (Freight Charges)*. If you select *Service*, you advance to the *Work with Dollar Chart by Source Screen (Service Charges)*.

Work with Dollar Chart by Source Screen (Freight Charges)

Purpose: Use this screen to define freight charges for this source code. The system uses this table if the Freight method defined for the source code is *$ Chart by Src*.

How to display this screen: Complete the *First Work with Dollar Chart by Source Screen (Select Source and Type)* or select *Freight charges* for a source code on the *Work with Source Codes Screen*. The following message displays if you have not defined a freight method at the source code level:

```
Freight method is not Dollar Chart.
```

Field	Description
Dollar amount	The dollar amount for the dollar chart. If the merchandise total for on order is less than or equal to this dollar amount, the system applies the Freight charge or the Percentage associated with this dollar amount. **Note:** If the [Include Handling in Freight Charge Calculation (D77)](#) system control value is *selected*, the system will also include handling along with merchandise in the freight charge calculation. Numeric, 13 positions with a 2-place decimal; optional.
Freight charge	The shipping charge associated with the Dollar amount. Numeric, 13 positions with a 2-place decimal; optional.
Pct (Percentage)	A percentage of the order's merchandise total used to calculate the freight or service charge. **Note:** If the *Include Handling in Freight Charge Calculation (D77)* system control value is *selected*, the system will also include handling along with merchandise in the freight charge calculation. Numeric, 5 positions with a 2-place decimal; optional.
Maximum charge	The maximum amount to charge for shipping. Numeric, 13 positions with a 2-place decimal; optional.

Screen Option	Procedure
Update the freight charge or maximum freight amount for a tier on the dollar chart for this source code	Select *Change* for a tier on the dollar chart by source to advance to the Change Dollar Chart by Source screen (Freight Charges). For field descriptions, see *Create Dollar Chart by Source Screen (Freight Charges)*. You can change all fields except the Source code and Dollars fields.
Delete a tier in the dollar chart for this source code	Select *Delete* for a tier on the dollar chart by source to delete it.

Screen Option	Procedure
Review information for a tier on the dollar chart for this source code	Select *Display* for a tier on the dollar chart by source to advance to the Display Dollar Charge by Source screen (Freight Charges). You cannot change any fields on this screen. For field descriptions, see *Create Dollar Chart by Source Screen (Freight Charges)*.
Create a new tier on the dollar chart by source	Select *Create* to advance to the *Create Dollar Chart by Source Screen (Freight Charges)*.

Create Dollar Chart by Source Screen (Freight Charges)

Purpose: Use this screen to create a freight chart for a source code.

How to display this screen: Select *Create* at the Work with Dollar Chart by Source Screen (Freight Charges) .

You must define a freight charge by entering a dollar amount in the Freight charge field or a percentage of the dollar amount in the Pct field. Optionally, you can enter a maximum charge to use.

Field	Description
Source	The code and description for a group of customers to whom you mail an offer. See *Working with Source Codes (WSRC)*. (Source) Alphanumeric, 9 positions; display-only. (Description) Alphanumeric, 30 positions; display-only.
Dollars	The merchandise dollar amount on the customer's order. When the merchandise total is equal to or greater than the dollar amount you enter, the freight charge defined in the Freight charge field, the Pct field, or the Maximum charge field will be applied to the customer's order. **Note:** If the *Include Handling in Freight Charge Calculation (D77)* system control value is *selected*, the system will also include handling along with merchandise in the freight charge calculation. Numeric, 13 positions with a 2-place decimal. Create screen: required. Change screen: display-only.

Field	Description
Freight amount	The flat dollar amount of freight to apply to a customer's order when the merchandise dollar amount on the order is equal to or greater than the amount defined in the Dollar amount field. For example, If you enter 100.00 in the Dollar amount field, and 4.95 in the Freight charge field, the system adds $4.95 to the order as freight when the total order amount subject to freight is $100.00 or less. **Note:** If the *Include Handling in Freight Charge Calculation (D77)* system control value is *selected*, the system will also include handling along with merchandise in the freight charge calculation. Numeric, 13 positions with a 2-place decimal; required if you do not define a percentage in the Pct field.
Freight percent	The percentage of the merchandise total to apply to a customer's order as freight when the merchandise dollar amount on the order is equal to or greater than the amount defined in the Dollar amount field. For example, If you enter 50.00 in the Dollar amount field, and 5.00 in the Pct field, the system applies $2.50 to the order as freight when the total amount subject to freight is $50.00 or less. **Note:** If the *Include Handling in Freight Charge Calculation (D77)* system control value is *selected*, the system will also include handling along with merchandise in the freight charge calculation. Numeric, 5 positions with a 2-place decimal; required if you do not define a dollar amount in the Freight charge field.
Maximum freight amount	The maximum dollar amount of freight to charge, regardless of the result of the freight calculation. You need to complete this field only if you are calculating freight on the merchandise dollar amount by percentage (if you have entered a percentage in the Pct field.) Numeric, 13 positions with a 2-place decimal; optional.

Work with Dollar Chart by Source Screen (Service Charges)

Purpose: Use this screen to define service charges for a source code. Service charges are additional charges that are added to an order if the merchandise amount on the order is equal to or greater than an amount specified in this table.

> **Note:**
>
> If you are setting up service charges, you should complete the Additional charge code field for Dollar chart charges in the Offer table.

How to display this screen: Complete the *First Work with Dollar Chart by Source Screen (Select Source and Type)*. You can also display this screen by select *Service charges* for a source code at the *Work with Source Codes Screen*.

Field	Description
Dollar amount	Allows you to enter a dollar amount for the service charge chart. Numeric, 13 positions with a 2-place decimal; optional.
Freight charge	Allows you to enter a dollar amount for the service charge chart. Numeric, 13 positions with a 2-place decimal; optional.
Pct (Percentage)	Allows you to enter a percentage of the order's total merchandise dollar amount that is used to calculate the service charge. Numeric, 5 positions with a 2-place decimal; optional.
Maximum charge	Allows you to enter the maximum amount to charge for service charges. Numeric, 13 positions with a 2-place decimal; optional.

Screen Option	Procedure
Update a service charge amount or percent for a tier on the service charge chart	Select *Change* for a tier on the service chart by source to advance to the Change Dollar Chart by Source screen (Service Charges). For field descriptions, see *Create Dollar Chart by Source Screen (Service Charge)*. You can change all fields except the Source code and Dollars fields.
Delete a tier in the service charge chart for this source code	Select *Delete* for a tier on the dollar chart by source to delete it.
Review information for a tier on the service charge chart for this source code	Select *Display* for a tier on the dollar chart by source to advance to the Display Dollar Chart by Source screen (Service Charges). You cannot change any fields on this screen. For field descriptions, see *Create Dollar Chart by Source Screen (Service Charge)*.
Create a new tier on the service charge chart by source	Select *Create* to advance to the *Create Dollar Chart by Source Screen (Service Charge)*.

Create Dollar Chart by Source Screen (Service Charges)

Purpose: Use this screen to create a service charge for a source code.

How to display this screen: Select *Create* at the *Work with Dollar Chart by Source Screen (Service Charges)*.

You must define a service charge by entering a dollar amount in the Service amount field or a percentage of the dollar amount in the Service pct field. Optionally, you can enter a maximum charge to use.

Field	Description
Source	The unique user-defined code and description for a segment of your customer base to whom you mail an offer. See *Working with Source Codes (WSRC)*. (Source) Alphanumeric, 9 positions; display-only. (Description) Alphanumeric, 30 positions; display-only.
Dollars	The merchandise dollar amount on the customer's order. When the merchandise total is equal to or greater than the dollar amount you enter, the service charge defined in the Service charge field, the Service percent field, or the Maximum service amount field will be applied to the customer's order. For example, if the merchandise total is between and including .01 and 25.00, the service charge will be 3.00. If the merchandise total is between and including 26.00 and 50.00, the service charge will be 5.00. If the merchandise total is 50.01 or over, the service charge will be 6% of the merchandise dollar amount, up to $7.00. Numeric, 13 positions with a 2-place decimal. Create screen: required. Change screen: display-only.
Service amount	The flat dollar amount of a service charge that will be applied to a customer's order when the merchandise dollar amount on the order is equal to or greater than the amount defined in the Dollars field. Numeric, 13 positions with a 2-place decimal; required if you do not define a percentage in the Service percent field.
Service percent	The percentage of the merchandise total that will be applied to a customer's order as a service charge when the merchandise dollar amount on the order is equal to or greater than the amount defined in the Dollars field. Numeric, 5 positions with a 2-place decimal; required if you do not define a dollar amount in the Service amount field.
Maximum service amount	The maximum dollar amount of a service charge, regardless of the result of the service charge calculation. You only need to complete this field if you are calculating the service charge on the merchandise dollar amount by percentage (if you have entered a percentage in the Service percent field.) Numeric, 13 positions with a 2-place decimal; optional.

Initializing an Offer (MOFI)

Purpose: Initializing an offer is used to:

- Delete an offer you are no longer using.
- Initialize an offer without transferring data.
- Transfer data from one offer to another, initializing the "copy to offer" without deleting the "copy from offer."

For more information: See *Working with Offers (WOFR)*.

Offer Initialization Screen

How to display this screen: Enter *MOFI* in the Fast path field or select this option from a menu.

Field	Description
Copy from offer	The code for the offer from which you want to merge item and pricing data into another offer. If you only wish to initialize an offer, enter the offer code in this field and leave the Copy to offer field blank. Numeric, 3 positions; required.
Copy to offer	The code for the offer to which you want to transfer item and pricing data. Numeric, 3 positions; optional.
Res off source codes (Restrict offer's source codes)	Indicates whether you wish to restrict the use of a source code. Restricting a source code prevents it from being assigned to an order. This is useful for source codes you no longer use, but cannot delete since there are still open orders outstanding. *Unselected* when the source code is created. During Offer Initialization, you have the option to restrict all sources codes associated with a particular offer; the source codes you restrict are not copied to the offer being initialized. *Selected* = The source codes will not be copied to the offer being initialized. *Unselected* = The source code will be copied to the offer being initialized.

Instructions: Follow the steps listed below to initialize an offer.

- Complete the required fields and select *Accept* to accept your entries and initialize the offer.

Working with Special Pricing by Source Code (WSPP)

Purpose: Use the Work with Source Special Pricing function to create special price breaks for items by source code. The special pricing you define can include quantity breaks and associate pricing.

In addition to this menu option, you can also use the *Special Pricing* option in *Working with Source Codes (WSRC)* or the *Source Prices* option in Work with Items (see *Entering Additional Item Information*). Using Work with Source Special Pricing makes the task easier if you are entering special pricing for multiple items and/or source codes.

For example, you can use the Special Pricing by Source Code function to enter two source codes (SOURCE1 and SOURCE2) and two quantity breaks for the same item ($10 for 1 of ITEM1 and $9 for 5 of ITEM1). The function will create the following four special prices by source code:

- $10 for 1 of ITEM1 for SOURCE1
- $9 for 5 of ITEM1 for SOURCE1
- $10 for 1 of ITEM1 for SOURCE2
- $9 for 5 of ITEM1 for SOURCE2

You cannot create special pricing by source code for different SKUs of an item. You must define special pricing for the base item, and the pricing will apply to all SKUs.

Related system control values:

- If the *Perform Source Pricing Validation (D62)* system control value is *selected* and there are any source special pricing records set up for the source code on the order header, the system prevents you from adding any items to the order if they are not included in the special source pricing.
- The *Pricing Values (B31)* system control value controls the order in which the system evaluates pricing options for the order, based on the priority assigned to the *Special by Source Sequence # (A82)* system control value.

In this topic:

- *Work with Sources for Special Pricing Screen*
- *Work with Items for Special Pricing Screen*
- *Change Item Special Price Screen*
- *Duplicate Special Pricing by Source Report*

Work with Sources for Special Pricing Screen

Purpose: Use this screen to enter source codes to receive special pricing for certain items.

How to display this screen: Enter *WSPP* in the Fast path field at the top of any menu or select Work with Source Special Pricing from a menu.

Field	Description
Source code	A code representing a group of customers. Source codes are defined in and validated against the Source Code table; see *Working with Source Codes (WSRC)*. Alphanumeric, 9 positions; required.
Description	The description of a source code. Alphanumeric, 30 positions; display-only.

Instructions:

- Enter a source code in the source code field at the top of the screen. The system clears the data from the source code field and lists the source code and description in the middle of the screen.
- Continue entering additional source codes as in step 1. The system adds each new source code to the beginning of the source code and description list.
- When you have entered all the source codes to receive the item special pricing, select *Accept* to accept. You advance to the *Work with Items for Special Pricing Screen*.

Screen Option	Procedure
Delete a source code	Select *Delete* for a source code.
Accept the source code list and advance to the *Work with Sources for Special Pricing Screen*	Select *Accept*.
Reject the source code list and return to the previous screen	Select *Reject*.

Work with Items for Special Pricing Screen

Purpose: Use this screen to enter the items, quantities and prices that apply to each of the source codes you entered on the *Work with Items for Special Pricing Screen.*

How to display this screen: Select *Accept* to accept a list of source codes at the *Work with Sources for Special Pricing Screen*.

Field	Description
Item	A code representing a unit of inventory. Item codes are defined in and validated against the Item table. You cannot enter a SKU at this screen. If an item has SKUs, you must define special pricing for the base item, and the pricing will apply to all SKUs. Alphanumeric, 12 positions; required.
Description	The description associated with an item. Alphanumeric, 20 positions; display-only.
Quantity	The quantity of the item a customer must order to receive the special pricing. Numeric, 5 positions; required.
Price	The special price for the item, quantity and source codes. Numeric, 13 positions with a 2-place decimal; required.
Assoc price (Associate price)	The special price of the item for associate customers. You can define a customer as an associate or member who is eligible for additional special pricing through the Work with Customer Sold To function (see *Selecting Customers*). Numeric, 13 positions with a 2-place decimal; optional.
Tax inclusive price	The special price of the item if the order is subject to VAT. Displayed only if the *Tax Included in Price (E70)* system control value is *selected*. Numeric, 13 positions with a 2-place decimal; optional.
Tax inclusive assoc (Tax-inclusive associate price)	The special price of the item for associate customers if the order is subject to VAT. Displayed only if the *Tax Included in Price (E70)* system control value is *selected*. Numeric, 13 positions with a 2-place decimal; optional.

Instructions: Follow the steps below to enter items and quantities for special source code pricing.

- Complete the item, quantity and price fields, plus the associate price field if necessary. If you attempt to enter more than one special price for a quantity of an item, the system displays a message: `Item work already exists.`
- The system clears the data from the top of the screen and displays the special pricing for the item and quantity in the center of the screen.
- Enter as many item/quantity special pricing combinations as you need by repeating the first steps. The system adds each additional item/quantity special pricing combination to the top of the list.
- Select *Accept* to accept. The system returns you to a menu and submits a job called *SPEC_PRIC*. This job creates special pricing by item and quantity for each source code you entered on the *Work with Sources for Special Pricing Screen*.

> **Note:**
>
> If you return to the Work with Special Pricing by Source Code function while the *SPEC_PRIC* job is running, the information you entered previously is still on the screen. The system clears this information when the job is complete.

If there are any duplicate special pricing records, the system creates the *Duplicate Special Pricing by Source Report*.

Screen Option	Procedure
Change a special price	Select *Change* for a special price to advance to the *Change Item Special Price Screen*.
Delete a special price	Select *Delete* for a special price.
Return to the *Work with Sources for Special Pricing Screen*	Select *Source Entry*.
Accept your entries and create the special pricing by source code	Select *Accept*.
Reject the special pricing by source code list and return to the previous screen	Select *Reject*.

Change Item Special Price Screen

Purpose: Use this screen to change the special price or special associate price for a quantity of an item. The tax-inclusive prices display only if the *Tax Included in Price (E70)* system control value is *selected*. For field descriptions, see *Work with Items for Special Pricing Screen*.

How to display this screen: Select *Change* for an special price at the *Work with Items for Special Pricing Screen*.

Generating Source Codes Using the Source Upload Table (WSRW)

Purpose: You can create a Order Administration source code using information from the *Source Upload Table (IXSRCE)*.

Transferring data into the Source Upload table:

- Use the *File Storage API* to upload the file, and then run the *UPSRCCD Upload Source Code File* (Program name *PFR0134*, Parameter *IXSRCE*) periodic function; or
- Use the *Work with File Uploads (WUPL)* menu option to upload records to the Source Upload table.

> **Note:**
>
> The database does not allow an empty (null) value in any field, so in order to populate the *Source Upload Table (IXSRCE)* without error for fields that you do not want to populate in the created source code records, enter a zero (for a numeric field) or a space (for an alphanumeric field).

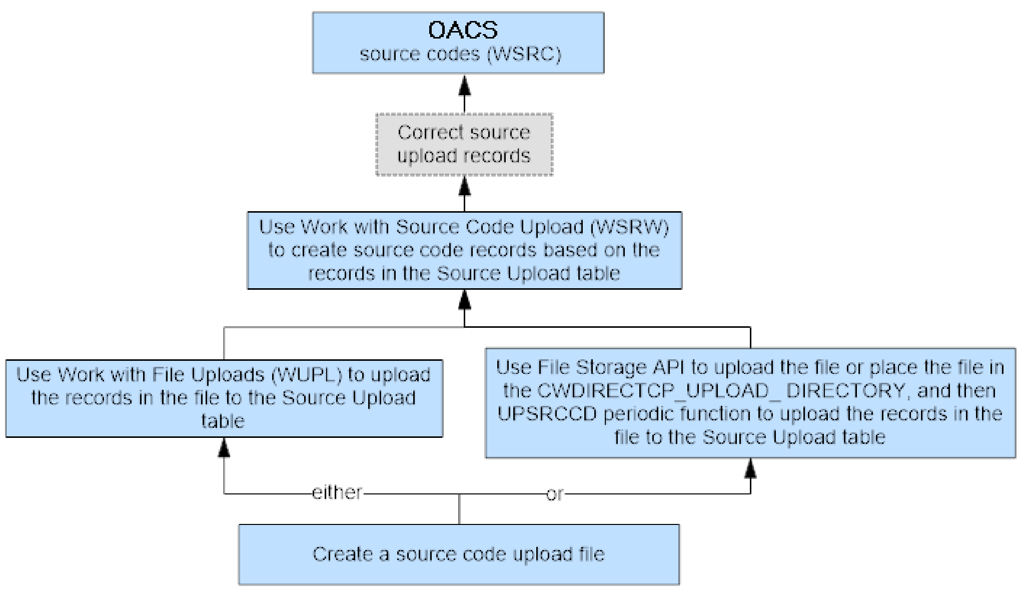
You can use the sample data below to create a Source Code upload file.

```
7|SOURCECD7|C|$O|H|D|K|SOURCECD7 SOURCE CODE DESCRIPT|500.00|.00|.00|CD|
5.00|DR|N|12.00|5.00|25.00|5.00|1|10000|1150401|5000|7000|POP UP WINDOW
MESSAGE 1 |POP UP WINDOW MESSAGE 2 |POP UP WINDOW MESSAGE 3 |POP UP WINDOW
MESSAGE 4 |12345|1234567|12.00|12345|123|Y|N|Y|12.00|12.00|150.00|55.00|
ALPHANUMERIC 30 POSITIONSUSER1|ALPHANUMERIC 30 POSITIONSUSER2|ALPHANUMERIC
30 POSITIONSUSER3|ALPHANUMERIC 30 POSITIONSUSER4|ALPHANUMERIC 30
POSITIONSUSER5|ALPHANUMERIC 30 POSITIONSUSER6|N|N|07| |007|01|01|123|RCCD|
LSTSOURCE|FPOCD|N|CAT|CL|1150601| | |123.00|N|N|
```

Once you upload records to the Source Upload table, you can use the Work with Source Code Upload File (WSRW) menu option to change, delete, or display source upload records and then transfer the records to the Source Code table.

When you transfer the source code records, the system validates each record in the Source Upload table:

- If a source upload record contains any errors, the system flags the record with a status of *E* and includes the record on the *Source Code Upload File Exception Report*. You can correct source upload records that are in an error status by selecting *OK* on the *Change Source Code Upload File Screen (1 of 2)*.
- If a source upload record does not contain any errors, the system transfers the record to the Source Code table and displays the record on the *Source Code Upload File Processed Listing*. See *Working with Source Codes (WSRC)*.
- **Source code upload process:** The following flowchart explains how the system creates a Order Administration source code using information defined in the Source Upload table.



In this topic:

- *Work with Source Code Upload File Screen*
- *Change Source Code Upload File Screen (1 of 2)*

- *Display Source Code Upload File Screen*
- *Source Code Upload File Processed Listing*
- *Source Code Upload File Exception Report*

Work with Source Code Upload File Screen

Purpose: This screen displays all of the records in the *Source Upload Table (IXSRCE)*. Use this screen to review, change, delete and transfer source code work records.

How to display this screen: Enter *WSRW* in the Fast path field at the top of any menu or select Work with Source Code Upload from a menu.

Field	Description
Source (Source code)	A unique, user-defined code to identify a segment of your customer base and to analyze sales. The source code drives marketing, pricing, freight, and service charge information on an order. See *Working with Source Codes (WSRC)*. Alphanumeric, 9 positions; optional.
Description	The description of this source code. Alphanumeric, 30 positions; optional.
Div (Division code)	A unique code for a profit center or area of financial reporting. Alphanumeric, 2 positions; optional.
Promo (Promotional code)	A code to group source codes together. See *Working with Promotions (WPRO)*. Alphanumeric, 7 positions; optional.
Offer	The code for the catalog, space, or advertisement from which you accept orders. See *Working with Offers (WOFR)*. Alphanumeric, 3 positions; optional.
Status (Source code work file status)	A code used to indicate whether this source code work record contains an error. Valid values are: *E* = the source code work record contains an error. blank = the source code work record does not contain an error. Alphanumeric, 1 position; optional.

Instructions:

Select *Process File* to submit the transfer from the Source Upload table to the Source Code table. A message indicates that the source code transfer has been submitted.

The job validates that:

- The value defined in the Source code field is unique for the company you are working in.
- The Company, Consumer/business, Freight method, House account code, Price method, Type, Description, Breakeven amount, Restricted, Display on O/E select, Division, and Offer fields contain information.
- The Consumer/business, Freight method, House account code, Price method, Type, Exclude service charge, Promotion pricing, Display on O/E select, Exclude from flexible option, Exclude promotion, Division, Promotion code, Offer, Source category, Freight table, FPO payment code, and Price table fields contain valid values.

If a record passes all of the edits performed, the system:

- prints the source upload record on the *Source Code Upload File Processed Listing*. This report lists all source codes created through the source code upload.
- creates a Order Administration source code. You can review or maintain the source code in *Working with Source Codes (WSRC)*.
- deletes the record from the Source Upload table.

If a record does not pass all of the edits performed, the system:

- prints the source upload record on the *Source Code Upload File Exception Report*. This report lists all of the source upload records that contain errors.
- retains the source upload record in the Source Upload table until the record is fixed or deleted. You can correct errors that exist on a source upload record on the *Change Source Code Upload File Screen (1 of 2)*.

Screen Option	Procedure
Change a source upload record	Select *Change* for a source upload record to advance to the *Change Source Code Upload File Screen (1 of 2)*.
Delete a source upload record	Select *Delete* for a source upload record to delete it.
Display a source upload record	Select *Display* for a source upload record to advance to the *Display Source Code Upload File Screen*.
Submit the upload process	Select *Process File*. See above.

Change Source Code Upload File Screen (1 of 2)

Purpose: Use this screen to change information defined for a source upload record.

When you select *OK* on this screen, the system highlights any fields that are in error so that you can correct them. You cannot transfer a source upload record to the Source Code table if it contains any errors.

How to display this screen: On the *Work with Source Code Upload File Screen*, select *Change* for a source upload record.

See *Create Source Code Screen (1 of 2)* for a description of the fields on this screen.

Change Source Code Upload File (2 of 2)

How to display this screen: Select *OK* on the *Change Source Code Upload File Screen (1 of 2)*.

See *Create Source Code Screen (1 of 2)* for a description of the fields on this screen.

Display Source Code Upload File Screen

How to display this screen: Select *Display* for a source upload record at the *Work with Source Code Upload File Screen* to advance to the Display Source Code Upload File screen. You cannot change any information on this screen. For field descriptions, see *Create Source Code Screen (1 of 2)*.

Source Upload Table (IXSRCE)

Purpose: You can use the Work with Source Code Upload (WSRW) menu option to create source codes in your company based on the data in this table. See *Generating Source Codes Using the Source Upload Table (WSRW).*

Field	Attributes	Field Description
Company	Numeric, 3 positions; required	Order Administration company. This is a key field.
Source code	Alphanumeric, 9 positions; required	Order Administration source code. The source code must be a unique code within the Source Code table. This is a key field.
Consumer/ business	Alphanumeric, 1 position; required	Valid values are: *B* = business *C* = consumer
Freight method	Alphanumeric, 2 positions; required	Valid values are: *$O* = dollar chart/offer *$S* = dollar chart/source *A* = actual billing amount *F* = flat rate/ship to *FI* = flat rate/item *FQ* = flat rate/quantity *FS* = flat rate/item source *I* = by item *OW* = order weight *PS* = percentage/source *PV* = percentage/ship via *R* = recipient *W* = weight
House account code	Alphanumeric, 1 position; required	Valid values are: *H* = house account blank = in-house list
Price method	Alphanumeric, 1 position; required	Valid values are: *C* = use item cost *D* = regular plus reprice *N* = no charge *O* = no charge/no cost *P* = regular hierarchy
Type	Alphanumeric, 1 position; required	Valid values are: *N* = do not analyze *K* = known *U* = unknown
Description	Alphanumeric, 30 positions; required	The source code description. This is a user defined field.
Breakeven amount	Numeric, 13 positions with a 2-place decimal; required	User defined field.
List broker code	Numeric, 3 positions	User defined field.
List cost	Numeric, 13 positions with a 2-place decimal	User defined field.
Cover code	Alphanumeric, 2 positions	User defined field.

Field	Attributes	Field Description
Discount %	Numeric, 5 positions with a 2-place decimal	User defined field.
Drop code	Alphanumeric, 2 positions	User defined field.
Exclude service	Alphanumeric, 1 position	Valid values are: *N* = no *Y* = yes blank = no value defined
Flat freight amount	Numeric, 13 positions with a 2-place decimal	User defined field.
Freight minimum	Numeric, 13 positions with a 2-place decimal	User defined field.
Freight maximum	Numeric, 13 positions with a 2-place decimal	User defined field.
Freight percent	Numeric, 5 positions with a 2-place decimal	User defined field.
Backorder priority	Numeric, 1 position	User defined field.
Gross circulation	Numeric, 7 positions	Informational only.
Mail date	Numeric, 7 positions (CYYMDD format)	NA
Marketing projection	Numeric, 13 positions with a 2-place decimal	User defined field.
Net circulation	Numeric, 7 positions	NA
Pop up window #1	Alphanumeric, 30 positions	User defined field.
Pop up window #2	Alphanumeric, 30 positions	User defined field.
Pop up window #3	Alphanumeric, 30 positions	User defined field.
Pop up window #4	Alphanumeric, 30 positions	User defined field.
Projected names	Numeric, 5 positions	User defined field.
Requests mailed	Numeric, 7 positions	NA
Secondary freight	Numeric, 13 positions with a 2-place decimal	User defined field.
Up to freight quantity	Numeric, 5 positions	User defined field.
Maximum ship tos-freight	Numeric, 3 positions	User defined field.
Promo pricing	Alphanumeric, 1 position	Valid values are: *N* = no *Y* = yes blank

Field	Attributes	Field Description
Restricted	Alphanumeric, 1 position; required	Valid values are: *N* = no *Y* = yes blank
Display on O/E select	Alphanumeric, 1 position; required	Valid values are: *N* = no *Y* = yes blank
% net fill	Numeric, 5 positions with a 2-place decimal	User defined field.
% margin	Numeric, 5 positions with a 2-place decimal	User defined field.
Cost per order	Numeric, 13 positions with a 2-place decimal	User defined field.
Variable ad expense	Numeric, 13 positions with a 2-place decimal	User defined field.
SRC user 1	Alphanumeric, 30 positions	User defined field.
SRC user 2	Alphanumeric, 30 positions	User defined field.
SRC user 3	Alphanumeric, 30 positions	User defined field.
SRC user 4	Alphanumeric, 30 positions	User defined field.
SRC user 5	Alphanumeric, 30 positions	User defined field.
SRC user 6	Alphanumeric, 30 positions	User defined field.
Exclude from flex opt	Alphanumeric, 1 position	Valid values are: *N* = no *Y* = yes blank
Exclude promotion	Alphanumeric, 1 position	Valid values are: *N* = no *Y* = yes blank
Division	Alphanumeric, 2 positions; required	Must be a valid Order Administration division.
Promotion code	Alphanumeric, 7 positions	Must be a valid Order Administration promotion code.
OFR number	Alphanumeric, 3 positions; required	Must be a valid Order Administration offer number.
Source category	Alphanumeric, 2 positions	Must be a valid Order Administration source category.
Ship via	Numeric, 2 positions	NA
Freight table	Alphanumeric, 3 positions	Must be a valid Order Administration freight table.
Recency code	Alphanumeric, 4 positions	Not currently implemented.
LST source	Alphanumeric, 9 positions	Not currently implemented.

Field	Attributes	Field Description
FPO payment code	Alphanumeric, 5 positions	Must be a valid Order Administration FPO payment code.
Catalog request	Alphanumeric, 1 position	Valid values are: *N* = no *Y* = yes blank
Catalog request type	Alphanumeric, 3 positions	Must be a valid Order Administration catalog request type.
Customer class	Alphanumeric, 2 positions	Must be a valid Order Administration customer class.
Discount expiration	Numeric, 7 positions (CYYMMDD format)	Must be a valid date.
File status	Alphanumeric, 1 position	Valid values are: *E* = an error exists on this record. blank = an error does not exist on this record.
Price table	Alphanumeric, 5 positions	Must be a valid Order Administration price table.
Commission pct	Numeric, 5 positions with a 2-place decimal	
Warranty required	Alphanumeric, 1 position	Valid values are: *N* = no *Y* = yes blank
Credit check?	Alphanumeric, 1 position	Valid values are: *N* = no *Y* = yes blank

Setting Up Pricing Information

Topics in this part: The following topics describe how to set up and change pricing information:

- *Understanding Promotional Pricing* provides an overview of promotional pricing and the basic information you need to set up pricing information on the system.
- *Work with Promotional Pricing Groups (WPRG)* describes how to create and change a promotional pricing group.
- *Work with Promotional Pricing (WPRP)* describes how to create and change a promotional pricing record. This record establishes the eligibility requirements and the incentives available in promotional pricing.
- *Working with Price Codes (WPCD)* describes how to create price codes that you can assign to various items, so that you can offer your customers special price breaks when they order a sufficient combined quantity of these items.
- *Assigning Price Codes (APCD)* describes how to assign price codes to items based on source code or offer.

- Price Code Upload describes how to upload price code information from an external system to create, update, or delete records in the Price Code, Price Code Customer, and Price Code Details tables.
- Display Price Code Assignments (DPCA) allows you to review the items/SKUs assigned to a price code by offer or source code and the requirements that must be met for an order to be eligible for the price code.
- *Working with Price Tables (WPTB)* describes how price table pricing works and how to create and maintain price tables from items and groups of items.
- *Package Insert Processing (WPIP)* describes how to create package insert/promotional items that will be automatically added to an order in Order Entry/Maintenance.
- *Working with Coupon Promotions (WCPR)* describes how to set up coupons for percentage or dollar discounts on an order, or for selected item(s), and provides an overview of how coupon discounts work.
- *Working with Customer Price Groups (WCPG)* describes how to create and work with customer price groups used during quantity price matrix pricing, customer price group pricing, and as a qualifier for a discount promotion.
- *Customer Price Group SKU Exclusion Upload* describes how to upload customer price group SKU exclusion information from an external system to create or update records in the Customer Price Group SKU Exclusion table.
- *Customer Price Group Pricing* provides an overview of the customer price group pricing method, required setup, and processing details.
- *Working with Quantity Price Matrix (WQPM)* describes how to create and work with the quantity price matrix pricing method.
- *Pricing Upload Interface* describes how to upload source discount and quantity price matrix pricing from an external system.

Working with Quantity Price Matrix (WQPM)

Purpose: Use the Work with Quantity Price Matrix menu option to create and work with quantity price matrix price breaks.

You can use the quantity price matrix pricing method to:

- Offer a quantity price matrix discount to eligible order lines on an order.
- Apply quantity price matrix discounts to eligible order lines during repricing and end-of-order pricing.

Available order entry formats:

- Line level quantity price matrix pricing is available in interactive order entry and maintenance and through orders received through the generic order interface (Order API).
- *End of Order Quantity Price Matrix Pricing* is available in interactive order entry and through orders received through the generic order interface (Order API). End of order quantity price matrix pricing is not available in order maintenance.

The system does not apply quantity price matrix pricing to orders entered using business to business order entry.

In this topic:

- *Quantity Price Matrix Setup*

- Determining the Quantity Price Matrix to Use
  - Example: Determining the Quantity Price Matrix to Use
- Determining the QPM Price to Use
  - Quantity Price Matrix Price Hierarchy
  - Calculating the QPM Price
  - Example: Determining the QPM Price to Use
- End of Order Quantity Price Matrix Pricing
  - Example 1: End of Order Quantity Price Matrix Pricing
  - Example 2: End of Order Quantity Price Matrix Pricing
- Quantity Price Matrix Pricing in Order Maintenance
- Quantity Price Matrix Examples
  - Example: QPM Detail Pricing by Item Category
  - Example: QPM Detail Pricing by Item
  - Example: QPM Special Pricing by Customer
  - Example: QPM Special Pricing by Customer Price Group
  - Example: QPM Special Pricing by Source Code
- Quantity Price Matrix Troubleshooting
- Work with Quantity Price Matrix Screen
- Create Quantity Price Matrix Screen
- Copy Quantity Price Matrix Window
- Work with Quantity Price Matrix Details Screen
- Work with Quantity Price Matrix Specials Screen

Quantity Price Matrix Setup

Before you can use the quantity price matrix pricing method, you must complete the necessary setup.

- Menu Options
- System Control Values

Menu Options

Menu Option	Description
Establishing Price Override Reason Codes (WPOR)	Create the price override reason code that you want the system to assign to an order line that is priced using a *Quantity Price Matrix Customer Special*.

Menu Option	Description
Working with Customer Price Groups (WCPG)	Create customer price groups to assign to sold to customers. You can create a *Quantity Price Matrix Customer Special* that uses a customer price group as one of the criteria required to qualify for the quantity price matrix special. See *Quantity Price Matrix Price Hierarchy* for a list of the criteria you can define for a quantity price matrix special.
Working with Quantity Price Matrix (WQPM)	Create the quantity price matrix pricing structure. • Use the *Work with Quantity Price Matrix Details Screen* to create the quantity break pricing structure for a specific: – item category and quantity – item and quantity – item, SKU and quantity • Use the *Work with Quantity Price Matrix Specials Screen* to create a special quantity break pricing structure for a specific item category, item, or item and SKU and define the criteria that must be met to qualify for the special pricing structure. You can use the following criteria for a quantity price matrix special: – sold to customer and quantity – customer price group and quantity – source code and quantity – sold to customer, source code and quantity – customer price group, source code and quantity See *Quantity Price Matrix Price Hierarchy* for the hierarchy the system uses to find quantity price matrix price to use.
Working with Source Codes (WSRC)	To do *End of Order Quantity Price Matrix Pricing* during repricing, the Price method field for the source code on the order header must be set to *Reg Plus Reprice*.

System Control Values

Entity level override: You can set up pricing value overrides for any entity that should use different pricing logic from your company-wide standard. In order entry, the system checks the entity associated with the source code on the order header to determine if entity-level pricing overrides are in effect. See *Working with Entities (WENT)* for more information.

System Control Value	Description
Quantity Price Matrix Hierarchy Sequence # (K40)	Defines the sequence in the pricing hierarchy in which the system uses the quantity price matrix line level pricing method. See *Pricing Values (B31)* for a list of the available pricing methods.

System Control Value	Description
Quantity Price Matrix Pricing (K41)	*Select* this field to have the system reprice items in order entry based on the price breaks you define in the *Working with Quantity Price Matrix (WQPM)* menu option. **Note:** If you select quantity price matrix pricing as your end-of-order pricing method, you cannot select any other end-of-order pricing method. If you are reviewing this system control value using the *Pricing Values (B31)* umbrella system control value, an error message displays `No other end of order methods allowed with Qty Price Matrix`.
Price Override Reason for Price Matrix Customer Specials (K42)	Enter the price override reason code that you want the system to assign to an order line that is priced using a *Quantity Price Matrix Customer Special*. The system assigns this price override reason code to eligible order lines during repricing. Any order lines that are assigned this price override reason code cannot be further discounted. However, you can still apply a source % discount to these order lines. Also, the system prevents you from manually entering this price override reason code for an order line in order entry or order maintenance: `Price override reason reserved and cannot be manually entered`. Leave this field blank if you want to allow the system to apply further discounting, such as promotions, to order lines that are priced using a *Quantity Price Matrix Customer Special*.

Determining the Quantity Price Matrix to Use

The system uses the quantity price matrix with the most recent Effective date whose status is *Active*. If more than one active quantity price matrix exists with the same effective date, the system uses the first quantity price matrix in alphanumeric order. For example, the system would use quantity price matrix A before quantity price matrix B.

If the *Multi Currency by Offer (E03)* system control value is selected, the system uses the quantity price matrix with the most recent Effective date whose status is *Active* and whose currency matches the currency defined for the offer associated with the source code on the order header.

Example: Determining the Quantity Price Matrix to Use

The following quantity price matrixes exist in the QPM Header table.

Quantity Price Matrix	Effective Date	Active	Currency
SM09 - Summer 2009	05/01/09	Active	USD
S409 - 4th of July Specials 2009	07/01/09	Active	USD
SC09 - Back to School 2009	07/01/09	Active	USD
2009 - 2009 Prices	01/01/09	Active	USD
HL09 - Holiday Specials 2009	11/01/09	Inactive	USD

The *Multi Currency by Offer (E03)* system control value is *selected*.

- On 6/30/09, a customer places an order. The currency defined for the offer associated with the source code on the order header is USD. In this situation, the system uses quantity price matrix *SM09* to price the items on the order.
- On 7/02/09, a customer places an order. The currency defined for the offer associated with the source code on the order header is USD. In this situation, the system uses quantity price matrix *S409* to price the items on the order. Quantity price matrix SC09 has the same effective date, but the system uses S409 because it comes first alphabetically.
- On 7/02/09, a customer places an order. The currency defined for the offer associated with the source code on the order header is CAN. In this situation, the system does not find a quantity price matrix it can use and instead, refers to the pricing hierarchy defined in the *Pricing Values (B31)* system control value to find the price for each line on the order.

Determining the QPM Price to Use

The system looks at the quantity price matrix specials and quantity price matrix details to find the quantity price matrix price to apply to an order line.

- You can define quantity price matrix specials at the *Work with Quantity Price Matrix Specials Screen*.
- You can define quantity price matrix details at the *Work with Quantity Price Matrix Details Screen*.

Quantity Price Matrix Price Hierarchy

The system uses the following hierarchy to find the quantity price matrix price to apply to an item on an order line.

#	Step
1.	Use a *Quantity Price Matrix Customer Special*. Quantity price matrix customer specials are QPM discount prices that use customer or customer price group as a qualifier. You define quantity price matrix customer specials at the defined at the *Work with Quantity Price Matrix Specials Screen*. See *Quantity Price Matrix Customer Special* for a list of available QPM customer specials.

#	Step
2.	Use a *Quantity Price Matrix Source Special*. Quantity price matrix source specials are QPM discount prices that use source code, and NOT customer or customer price group, as a qualifier. You define quantity price matrix source code specials at the *Work with Quantity Price Matrix Specials Screen*. See *Quantity Price Matrix Source Special* for a list of available QPM source specials.
3.	Use a *Quantity Price Matrix Detail*: Quantity price matrix details are QPM base prices for a specific item and SKU, item, or item category. You define quantity price matrix details at the *Work with Quantity Price Matrix Details Screen*. See *Quantity Price Matrix Detail* for a list of available QPM details.

Only one quantity price matrix price can apply to an order line. For example, if an order line qualifies for a QPM customer special and a QPM source special, the system applies the QPM customer special and not the QPM source special to the order line, based on the QPM price hierarchy outlined below.

Quantity Price Matrix Customer Special
A quantity price matrix customer special is a QPM discount price defined at the *Work with Quantity Price Matrix Specials Screen* that uses customer or customer price group as a qualifier.

If an order line qualifies for a QPM special that uses customer or customer price group as a qualifier, the system applies the *Price Override Reason for Price Matrix Customer Specials (K42)* to the order line during *End of Order Quantity Price Matrix Pricing*. When this price override reason code is defined for an order line, the system cannot apply other discounts, such as promotions, to the order line; however, the system can still apply a source % discount to the order line.

The system uses the following hierarchy to find the quantity price matrix customer special to apply to an item on an order line.

#	Step
1.	**Customer, Source Code, Item, SKU, Quantity** Use the QPM special whose *sold to customer* and *source code* match the sold to customer and source code on the order header and whose *item* and *SKU* match the item and SKU on the order line. If more than one quantity is defined for this QPM special, the system: • uses the QPM special whose quantity matches the order line quantity. • uses the QPM special whose quantity is less than, but closest to, the order line quantity.
2.	**Customer, Source Code, Item, Quantity** Use the QPM special whose *sold to customer* and *source code* match the sold to customer and source code on the order header and whose *item* matches the item on the order line. **If the item has SKUs, all SKUs for the item qualify for the price.** If more than one quantity is defined for this QPM special, the system: • uses the QPM special whose quantity matches the order line quantity. • uses the QPM special whose quantity is less than, but closest to, the order line quantity.

#	Step
3.	**Customer, Source Code, Item Category, Quantity** Use the QPM special whose *sold to customer* and *source code* match the sold to customer and source code on the order header and whose *item category* matches the item on the order line. The system looks at the SKU ITC Category field in the SKU table to find the item category defined for the item on the order line. If more than one quantity is defined for this QPM special, the system: • uses the QPM special whose quantity matches the order line quantity. • uses the QPM special whose quantity is less than, but closest to, the order line quantity.
4.	**Customer Price Group, Source Code, Item, SKU, Quantity** Use the QPM special whose *customer price group* and *source code* match the sold to customer and source code on the order header and whose *item* and *SKU* match the item and SKU on the order line. The system looks at the Price Group field in the Customer Sold To table to find the customer price group defined for the sold to customer on the order header. If more than one quantity is defined for this QPM special, the system: • uses the QPM special whose quantity matches the order line quantity. • uses the QPM special whose quantity is less than, but closest to, the order line quantity.
5.	**Customer Price Group, Source Code, Item, Quantity** Use the QPM special whose *customer price group* and *source code* match the sold to customer and source code on the order header and whose *item* matches the item on the order line. The system looks at the Price Group field in the Customer Sold To table to find the customer price group defined for the sold to customer on the order header. If the item has SKUs, all SKUs for the item qualify for the price. If more than one quantity is defined for this QPM special, the system: • uses the QPM special whose quantity matches the order line quantity. • uses the QPM special whose quantity is less than, but closest to, the order line quantity.
6.	**Customer Price Group, Source Code, Item Category, Quantity** Use the QPM special whose *customer price group* and *source code* match the sold to customer and source code on the order header and whose *item category* matches the item on the order line. The system looks at the Price Group field in the Customer Sold To table to find the customer price group defined for the sold to customer on the order header. The system looks at the SKU ITC Category field in the SKU table to find the item category defined for the item on the order line. If more than one quantity is defined for this QPM special, the system: • uses the QPM special whose quantity matches the order line quantity. • uses the QPM special whose quantity is less than, but closest to, the order line quantity.
7.	**Customer, Item, SKU, Quantity** Use the QPM special whose *sold to customer* matches the sold to customer on the order header and whose *item* and *SKU* match the item and SKU on the order line. If more than one quantity is defined for this QPM special, the system: • uses the QPM special whose quantity matches the order line quantity. • uses the QPM special whose quantity is less than, but closest to, the order line quantity.

#	Step
8.	**Customer, Item, Quantity** Use the QPM special whose *sold to customer* matches the sold to customer on the order header and whose *item* matches the item on the order line. **If the item has SKUs, all SKUs for the item qualify for the price.** If more than one quantity is defined for this QPM special, the system: • uses the QPM special whose quantity matches the order line quantity. • uses the QPM special whose quantity is less than, but closest to, the order line quantity.
9.	**Customer, Item Category, Quantity** Use the QPM special whose *sold to customer* matches the sold to customer on the order header and whose *item category* matches the item on the order line. The system looks at the SKU ITC Category field in the SKU table to find the item category defined for the item on the order line. If more than one quantity is defined for this QPM special, the system: • uses the QPM special whose quantity matches the order line quantity. • uses the QPM special whose quantity is less than, but closest to, the order line quantity.
10.	**Customer Price Group, Item, SKU, Quantity** Use the QPM special whose *customer price group* matches the sold to customer on the order header and whose *item* and *SKU* match the item and SKU on the order line. The system looks at the Price Group field in the Customer Sold To table to find the customer price group defined for the sold to customer on the order header. If more than one quantity is defined for this QPM special, the system: • uses the QPM special whose quantity matches the order line quantity. • uses the QPM special whose quantity is less than, but closest to, the order line quantity.
11.	**Customer Price Group, Item, Quantity** Use the QPM special whose *customer price group* matches the sold to customer on the order header and whose *item* matches the item on the order line. The system looks at the Price Group field in the Customer Sold To table to find the customer price group defined for the sold to customer on the order header. If the item has SKUs, all SKUs for the item qualify for the price. If more than one quantity is defined for this QPM special, the system: • uses the QPM special whose quantity matches the order line quantity. • uses the QPM special whose quantity is less than, but closest to, the order line quantity.
12.	**Customer Price Group, Item Category, Quantity** Use the QPM special whose *customer price group* matches the sold to customer on the order header and whose *item category* matches the item on the order line. The system looks at the Price Group field in the Customer Sold To table to find the customer price group defined for the sold to customer on the order header. The system looks at the SKU ITC Category field in the SKU table to find the item category defined for the item on the order line. If more than one quantity is defined for this QPM special, the system: • uses the QPM special whose quantity matches the order line quantity. • uses the QPM special whose quantity is less than, but closest to, the order line quantity.

#	Step
	Quantity Price Matrix Source Special A quantity price matrix source special is a QPM discount price defined at the *Work with Quantity Price Matrix Specials Screen* that uses source code, and NOT customer or customer price group, as a qualifier. If an order line qualifies for both a *Quantity Price Matrix Customer Special* and a *Quantity Price Matrix Source Special*, the system applies the customer special to the order line. **The system uses the following hierarchy to find the quantity price matrix source special to apply to an item on an order line.**
1.	**Source Code, Item, SKU, Quantity** Use the QPM special whose *source code* matches the source code on the order header and whose *item* and *SKU* match the item and SKU on the order line. If more than one quantity is defined for this QPM special, the system: • uses the QPM special whose quantity matches the order line quantity. • uses the QPM special whose quantity is less than, but closest to, the order line quantity.
2.	**Source Code, Item, Quantity** Use the QPM special whose *source code* matches the source code on the order header and whose *item* matches the item on the order line. **If the item has SKUs, all SKUs for the item qualify for the price.** If more than one quantity is defined for this QPM special, the system: • uses the QPM special whose quantity matches the order line quantity. • uses the QPM special whose quantity is less than, but closest to, the order line quantity.
3.	**Source Code, Item Category, Quantity** Use the QPM special whose *source code* matches the source code on the order header and whose *item category* matches the item on the order line. The system looks at the SKU ITC Category field in the SKU table to find the item category defined for the item on the order line. If more than one quantity is defined for this QPM special, the system: • uses the QPM special whose quantity matches the order line quantity. • uses the QPM special whose quantity is less than, but closest to, the order line quantity.
	Quantity Price Matrix Detail A quantity price matrix detail is a QPM base price defined at the *Work with Quantity Price Matrix Details Screen* for a specific item and SKU, item, or item category. If an order line qualifies for a *Quantity Price Matrix Customer Special* or *Quantity Price Matrix Source Special*, the system applies the customer special or source special to the order line instead of the QPM base price. **The system uses the following hierarchy to find the quantity price matrix detail to apply to an item on an order line.**
1.	**Item, SKU, Quantity** Use the QPM detail whose *item* and *SKU* matches the item and SKU on the order line. • If more than one quantity is defined for this QPM detail, the system: • uses the QPM detail whose quantity matches the order line quantity. • uses the QPM detail whose quantity is less than, but closest to, the order line quantity.

#	Step
2.	**Item and Quantity** Use the QPM detail whose *item* matches the item on the order line. If the item has SKUs, all SKUs for the item qualify for the price. If more than one quantity is defined for this QPM detail, the system: • uses the QPM detail whose quantity matches the order line quantity. • uses the QPM detail whose quantity is less than, but closest to, the order line quantity.
3.	**Item Category and Quantity** Use the QPM detail whose *item category* matches the item on the order line. The system looks at the SKU ITC Category field in the SKU table to find the item category defined for the item on the order line. If more than one quantity is defined for this QPM detail, the system: • uses the QPM detail whose quantity matches the order line quantity. • uses the QPM detail whose quantity is less than, but closest to, the order line quantity.

Order lines for a negative order quantity: You cannot create a quantity price matrix special or quantity price matrix detail for a negative quantity. If an order line is entered for a negative quantity, the system will not apply a quantity price matrix price to the order line; the order line will use the pricing hierarchy defined in the *Pricing Values (B31)* system control value to find the price for the order line. Also, order lines for a negative quantity are not included in the total quantity used for quantity price matrix pricing calculated during repricing and end of order pricing; see *End of Order Quantity Price Matrix Pricing*.

Order lines that have a manual price override: The system does not apply a quantity price matrix price to an order line if a manual price override is defined; the order line will use the manual price override. Also, the system includes the quantity for order lines that have a manual price override in the end-of-order quantity price matrix calculation. See *End of Order Quantity Price Matrix Pricing*.

Order lines that are soldout: The system does not apply a quantity price matrix price to an order line that is soldout; the order line will use the pricing hierarchy defined in the *Pricing Values (B31)* system control value to find the price for the order line. Also, order lines that are assigned a soldout control code are not included in the total quantity used for quantity price matrix pricing calculated during repricing and end of order pricing; see *End of Order Quantity Price Matrix Pricing*.

Calculating the QPM Price

Once the system finds the quantity price matrix special or quantity price matrix detail to apply to the order line, the system calculates the price for the order line.

When a QPM price is defined: If a price is defined for the quantity price matrix detail or quantity price matrix special, the system applies this price to the order line.

Example: If the QPM price is $8.00, the unit price of the item on the order line is $8.00. If the order quantity for the item on the order line is 2, the extended price of the item on the order line is $16.00.

When a QPM discount percentage is defined: If a discount percentage is defined for the quantity price matrix special, the system applies this discount percentage to the price defined for the associated quantity price matrix detail.

The system uses the item category, item, SKU, and quantity defined for the quantity price matrix special to find the associated quantity price matrix detail.

Example: If the quantity price matrix special is:

Customer	Item	SKU	Quantity	% Discount
2	AB10	RED	1	10%

The quantity price matrix detail associated with the special is:

Item	SKU	Quantity	Price
AB10	RED	1	8.00

And the price to apply to the order line when item AB10 RED for a quantity of 1 is ordered is *7.20* (8.00 QPM detail price - 10% QPM customer special discount = 7.20).

If a quantity price matrix detail does not exist for the same quantity as defined for the quantity price matrix special, the system uses the quantity price matrix detail for the next available lower quantity.

Example: If the quantity price matrix special is:

Customer	Item	SKU	Quantity	% Discount
2	AB10	RED	3	10%

The quantity price matrix details associated with the special are:

Item	SKU	Quantity	Price
AB10	RED	1	8.00
AB10	RED	2	7.50
AB10	RED	4	7.00

The system uses the quantity price matrix detail for a quantity of 2 to apply to the order line when item AB10 RED for a quantity of 3 is ordered. The price to apply to the order line is *6.75* (7.50 QPM detail price - 10% QPM customer special discount = 6.75).

When a QPM price cannot be found: If the system cannot find a quantity price matrix price, the system uses the next pricing method in the pricing hierarchy defined in the *Pricing Values (B31)* system control value to find the price for the order line. If the system cannot find a price using any available pricing method, the system displays the standard error message: `Price (0.00) cannot be zero for item`.

Pricing method description: The pricing method description that displays on the *Work with Order Line Screen (Changing/Adding an Item)* shows the method used to calculate the price for the item.

- `Qty Price Matrix` displays if the price is a result of a *Quantity Price Matrix Detail* or *Quantity Price Matrix Source Special*.
- `Qty Price Matrix Cust Ovr` displays if the price is a result of a *Quantity Price Matrix Customer Special*. Once the system reprices the order, the system updates the pricing method description to `Qty Price Matrix`.

Discount calculation messages: If you have defined an offer price for your items and the *Display Order Line Discount Messages (F01)* system control value is *selected*, the system displays *Discount Calculation Messages* when you add an item to an order, indicating the order line number of the discounted item, the offer price, the actual price (the discounted price the customer is paying), the dollar amount of the discount, and the discount percentage. For example, if the item offer price is $10.00 and the *Quantity Price Matrix Detail* price is $5.00, the discount calculation message displays as: `Line 1: Offer = 10.00 Actual = 5.00 Discount = 5.00: 50:00%`.

Price override reason for customer specials: If an order line qualifies for a *Quantity Price Matrix Customer Special*, the system applies the *Price Override Reason for Price Matrix Customer Specials (K42)* to the order line during *End of Order Quantity Price Matrix Pricing*. When this price override reason code is defined for an order line, the system cannot apply any other discounts, such as promotions, to the order line. However, the system can still apply a source % discount to the order line.

Also, the system prevents you from manually entering this price override reason code for an order line: `Price override reason reserved and cannot be manually entered`.

Order API: If the order uses quantity price matrix pricing and no actual_price is specified for the item in the *Inbound Order XML Message (CWORDERIN)*, then the order API uses the *Quantity Price Matrix Price Hierarchy* to apply a quantity price matrix price to the order line. If the item on the order line qualifies for a *Quantity Price Matrix Customer Special*, the system applies the QPM customer discount price to the order line and assigns the *Price Override Reason for Price Matrix Customer Specials (K42)* to the order line.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

> **Note:**
>
> The system does not validate that the price override reason code defined in the *Price Override Reason for Price Matrix Customer Specials (K42)* system control value is not passed as the prc_ovr_reason for an order line received through the generic order interface. However, you should not use the price override reason code defined in the *Price Override Reason for Price Matrix Customer Specials (K42)* system control value as the override reason code for any manually entered price that you define in the actual_price.

Example: Determining the QPM Price to Use

The following quantity price matrix details exist.

Item Category	Item	SKU	Qty	Price
	STCK1		1	5.50
	STCK1	HART	1	5.00
PENC			1	8.50

The following quantity price matrix specials exist.

Cust #	Source	Item Category	Item	SKU	Qty	Price	% Disc
17		PENC			1		10
17			STCK1		1		15
17			STCK1	HART	1		25
	S7	PENC			1	6.99	

Example 1: Customer *17* places an order for source code *S7*. The following lines are added to the order.

Item	SKU	Item Category	Line Qty	Results
STCK1	ANGL	STCK	1	The system applies the following *Quantity Price Matrix Customer Special* to the order line: customer = 17, item = STCK1, quantity = 1, % Disc = 15. In this situation, the price = *4.68* (5.50 QPM detail price - 15% customer special discount = 4.675).
STCK1	HART	STCK	1	The system applies the following *Quantity Price Matrix Customer Special* to the order line: customer = 17, item = STCK1, SKU = HART, quantity = 1, % Disc = 25. In this situation, the price = *3.75* (5.00 QPM detail price - 25% customer special discount = 3.75).
PENC1		PENC	1	The system applies the following *Quantity Price Matrix Customer Special* to the order line: customer = 17, item category = PENC, quantity = 1, % Disc = 10. In this situation, the price = *7.65* (8.50 QPM detail price - 10% customer special discount = 7.65). The system did not apply the *Quantity Price Matrix Source Special* to the order line because the *Quantity Price Matrix Customer Special* took precedence.

Example 2: Customer *25* places an order for source code *S7*. The following lines are added to the order.

Item	SKU	Item Category	Line Qty	Results
STCK1	ANGL	STCK	1	The system applies the following *Quantity Price Matrix Detail* to the order line: item = STCK1, quantity = 5, price = *5.50*. The system did not apply the *Quantity Price Matrix Customer Special* to the order line because the customer on the order did not qualify.

Item	SKU	Item Category	Line Qty	Results
STCK1	HART	STCK	1	The system applies the following *Quantity Price Matrix Detail* to the order line: item = STCK1, SKU = HART, quantity = 5, price = *5.00*. The system did not apply the *Quantity Price Matrix Customer Special* to the order line because the customer on the order did not qualify.
PENC1		PENC	1	The system applies the following *Quantity Price Matrix Source Special* to the order line: source code = S7, item category = PENC, quantity = 1, price = *6.99*. The system did not apply the *Quantity Price Matrix Customer Special* to the order line because the customer on the order did not qualify.

End of Order Quantity Price Matrix Pricing

Quantity Price Matrix Pricing (K41)
See *When Repricing Occurs*for more information on when repricing occurs during interactive order entry.

Source code setting: To do end of order quantity price matrix pricing, the Price method field for the source code on the order header must be set to *Reg Plus Reprice*.

The system does the following steps during end of order quantity price matrix pricing.

<table>
<tr><th>#</th><th>Step</th></tr>
<tr><td>1.</td><td>The system evaluates the order lines to find the price of each order line based on the Quantity Price Matrix Price Hierarchy.

The system finds the quantity price matrix price to apply to an order line based on the total order quantity of an item across the lines on the order. For example, if item A01 is on order line 1 for a quantity of 1 and is also on order line 2 for a quantity of 2, the system uses the total order quantity of 3 to find the quantity price matrix price to apply to each order line.

Order lines priced using a quantity price matrix customer special:
The system uses the quantity price matrix customer special as the price for the order line.
The system includes the order line in the total quantity used for quantity price matrix pricing calculated during repricing.
Order lines that have a manual price override:
The system uses the manual price override as the price for the order line.
The system includes the order line in the total quantity used for quantity price matrix pricing calculated during repricing.
Order lines for a negative order quantity:
The system does not apply a quantity price matrix price to the order line; the order line will use the pricing hierarchy defined in the Pricing Values (B31) system control value to find the price for the order line.
The system does not include the order line in the total quantity used for quantity price matrix pricing calculated during repricing.
Order lines that are assigned a soldout control code:
The system does not apply a quantity price matrix price to the order line; the order line will use the pricing hierarchy defined in the Pricing Values (B31) system control value to find the price for the order line.
The system does not include the order line in the total quantity used for quantity price matrix pricing calculated during repricing.
Orders lines for a BOGO (Buy One/Get One) discount:
The system uses the BOGO discount as the price for the order line.
The system does not include the order line in the total quantity used for quantity price matrix pricing calculated during repricing.
See BOGO (Buy One/Get One) Discount or Free Gift by Item Category or Item for more information.</td></tr>
<tr><td>2.</td><td>If the order line is priced using a Quantity Price Matrix Customer Special, the system defaults the Price Override Reason for Price Matrix Customer Specials (K42) to the order line.

Also, the system updates the pricing method description that displays on the Work with Order Line Screen (Changing/Adding an Item) from <code>Qty Price Matrix Cust Ovr</code> to <code>Qty Price Matrix</code>.</td></tr>
</table>

#	Step
3.	The system evaluates the order and order lines for any discounts, premiums, and promotions. The system decides whether an order qualifies for a discount, premium, or promotion based on the quantity price matrix price that is applied to each order line during repricing and not during initial order entry. If an order line has the *Price Override Reason for Price Matrix Customer Specials (K42)*, the system does not apply any other discounts, such as promotions, to the order line. However, the system can still apply a source % discount to the order line. *Example:* The following QPM prices are defined: • for a quantity of 1, the price = 5.00 • for a quantity of 2, the price = 4.50 • for a quantity of 3, the price = 3.50 You enter an order for source code S7. A source dollar discount is defined for S7: receive $2.00 off a $10.00 or more order. During initial order entry, you add the following order lines: • order line 1 for a quantity of 1 and a price of 5.00. • order line 2 for a quantity of 1 and a price of 5.00. During repricing, the system evaluates the total order quantity of the items on the order and reprices each order line: • order line 1 for a quantity of 1 and a price of 4.50. • order line 2 for a quantity of 1 and a price of 4.50. Because the order lines qualified for a different QPM price, the merchandise total is now 9.00 instead of 10.00 and the order no longer qualifies for the source dollar discount.

Order API: If the payment information is sent separately from the rest of the order in the generic order API, the *Detailed Order XML Response (CWORDEROUT)* might be generated twice: once when you receive the initial order message and once when you receive the payment information. In this situation, the system does end of order quantity price matrix pricing when it receives the initial order message without payment information. The system sends the final quantity price matrix price in the first pass and second pass of the *Detailed Order XML Response (CWORDEROUT)*; see *Discounted and Added Items in the CWOrderOut Response Message*.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Example 1: End of Order Quantity Price Matrix Pricing

The following price matrix details exist for quantity price matrix 2009.

Item Category	Quantity	Price
STCK	1	5.00
STCK	2	4.50
STCK	3	3.50

The following price matrix special exists for quantity price matrix 2009.

Customer	Item Category	Quantity	Price
132	STCK	4	3.00

Items STK1, STK2 and STK3 are all in item category STCK.

The price override reason code defined in the *Price Override Reason for Price Matrix Customer Specials (K42)* system control value is Q.

Customer 132 places an order for source code SPR09.

Initial order entry: The following lines are added to the order:

Item	Line Qty	Price	Price Ovr	Results
STK1	1			The system applies the following *Quantity Price Matrix Detail* to the order line: item = STK1, quantity = 1, price = *5.00*.
STK2	1	2.50	C	The system does not apply a quantity price matrix price to the order line because a price and price override reason code were manually entered. The system uses the manual price override of *2.50* for the order line.
STK2	1-			The system does not apply a quantity price matrix price to the order line because the order line quantity is a negative quantity. The system uses the item offer price of *6.00* for the order line.
STK3	1			The system applies the following *Quantity Price Matrix Detail* to the order line: item = STK1, quantity = 1, price = *5.00*.

Repricing: During repricing, the system reevaluates the order lines on the order to find the final quantity price matrix price.

Item	Line Qty	Price	Price Ovr	Results
STK1	1			Because order lines 1, 2, and 4 are eligible for end-of-order quantity price matrix pricing, the system applies the following *Quantity Price Matrix Detail* to the order line: item = STK1, quantity = 3, price = *3.50*. The order did not qualify for the *Quantity Price Matrix Customer Special* because only 3 units of the item in item category STCK were eligible for quantity price matrix pricing.
STK2	1	2.50	C	The system does not apply a quantity price matrix price to the order line because a price and price override reason code were manually entered. The price remains at *2.50*. However, the system includes this order line in the total quantity for end-of-order quantity price matrix pricing.
STK2	1-			The system does not apply a quantity price matrix price to the order line because the order line quantity is a negative quantity. The system uses the item offer price of *6.00* for the order line.

Item	Line Qty	Price	Price Ovr	Results
STK3	1			Because order lines 1, 2, and 3 are eligible for quantity price matrix pricing, the system applies the following *Quantity Price Matrix Detail* to the order line: item = STK1, quantity = 3, price = *3.50*. The order did not qualify for the *Quantity Price Matrix Customer Special* because only 3 units of the item in item category STCK were eligible for quantity price matrix pricing.

Example 2: End of Order Quantity Price Matrix Pricing

The following price matrix details exist for quantity price matrix 2009.

Item	Quantity	Price
ITM1	1	25.00
ITM2	1	15.00

The following price matrix special exists for quantity price matrix 2009.

Customer	Item	Quantity	Price
132	ITM2	2	10.00

The price override reason code defined in the *Price Override Reason for Price Matrix Customer Specials (K42)* system control value is Q.

Customer 132 places an order. A 20% source discount exists for the source code on the order. A 5% order promotion discount exists for the order.

Initial order entry: The following lines are added to the order:

Item	Line Qty	Price	Price Ovr	Results
ITM1	1			The system applies the following *Quantity Price Matrix Detail* to the order line: item = ITM1, quantity = 1, price = 25.00. The order line qualifies for the 20% source discount, making the price *20.00* (25.00 order line price - 20% source discount = 20.00).
ITM2	2			The system applies the following *Quantity Price Matrix Customer Special* to the order line: customer = 132, item = ITM2, quantity = 2, price = 10.00. The order line qualifies for the 20% source discount, making the price *8.00* (10.00 order line price - 20% source discount = 8.00).

Item	Line Qty	Price	Price Ovr	Results
ITM3	1-			The system does not apply a quantity price matrix price to the order line because the order line quantity is a negative quantity. The system uses the item offer price of 3.00 for the order line. The order line qualifies for the 20% source discount, making the price *2.40* (3.00 order line price - 20% source discount = 2.40).
ITM4	1	75.00	C	The system does not apply a quantity price matrix price to the order line because a price and price override reason code were manually entered. The order line does not qualify for the 20% source discount.

Repricing: During repricing, the system reevaluates the order lines on the order to find the final quantity price matrix price.

Item	Line Qty	Price	Price Ovr	Results
ITM1	1			The system applies the following *Quantity Price Matrix Detail* to the order line: item = ITM1, quantity = 1, price = 25.00. The order line qualifies for the 20% source discount, making the price *20.00* (25.00 order line price - 20% source discount = 20.00). During repricing, the order line qualifies for the 5% promotion discount, making the price *19.00* (20.00 order line price - 5% promotion discount = 19.00).
ITM2	2		Q	The system applies the following *Quantity Price Matrix Customer Special* to the order line: customer = 132, item = ITM2, quantity = 2, price = 10.00. The order line qualifies for the 20% source discount, making the price *8.00* (10.00 order line price - 20% source discount = 8.00). During repricing, the system applies the *Price Override Reason for Price Matrix Customer Specials (K42)* to the order. Because this price override reason is assigned to the order line, the order line does not qualify for the 5% promotion discount.
ITM3	1-			The system does not apply a quantity price matrix price to the order line because the order line quantity is a negative quantity. The system uses the item offer price of 3.00 for the order line. The order line qualifies for the 20% source discount, making the price *2.40* (3.00 order line price - 20% source discount = 2.40). Because the order line is for a negative quantity, the order line does not qualify for the 5% promotion discount.

Item	Line Qty	Price	Price Ovr	Results
ITM4	1	75.00	C	The system does not apply a quantity price matrix price to the order line because a price and price override reason code were manually entered. The order line does not qualify for the 20% source discount. During repricing, the order line qualifies for the 5% promotion discount, making the price *71.25* (75.00 order line price - 5% promotion discount = 71.25).

Quantity Price Matrix Pricing in Order Maintenance

During order maintenance, the system does line-level quantity price matrix pricing, but does not do end-of-order quantity price matrix pricing.

Order Maintenance Action	Results
Adding a new line to the order	When you add an order line in order maintenance, the system finds the quantity price matrix price for each individual order line as in order entry; see *Determining the QPM Price to Use* and *Calculating the QPM Price*. If you add more than one order line for the same item, the system will not reprice the order lines based on the total quantity of the item across order lines. *Example:* The following QPM prices are defined: • for a quantity of 1, the price = 5.00 • for a quantity of 2, the price = 4.50 • for a quantity of 3, the price = 3.50 You add order line 3 for a quantity of 1; the system assigns a price of 5.00. You add order line 4 for a quantity of 1; the system assigns a price of 5.00. The system does not assign a price of 4.50 to each order line, even though the total order quantity for the item across order lines is 2.
Changing an existing line on the order	If you change the quantity on an order line in order maintenance, the system will not change the price to show the new quantity price matrix price break that applies to the order line, based on the new order line quantity. *Example:* The following QPM prices are defined: • for a quantity of 1, the price = 5.00 • for a quantity of 2, the price = 4.50 • for a quantity of 3, the price = 3.50 The order quantity for an existing order line is 2 with a price of 4.50. If you change the order line quantity from 2 to 1, the system does not update the price to 5.00 and instead keeps the price of 4.50.

Order Maintenance Action	Results
Repricing an order	The Reprice option is not available in Order Maintenance. When this option is selected, the following error message displays: `Selected function is not valid for current processing mode (Maintain).` If the total quantity ordered for an item or item category across order lines results in the order lines qualifying for a different quantity price matrix price, the system does not apply the new price to the order lines. *Example:* The following QPM prices are defined: • for a quantity of 1, the price = 5.00 • for a quantity of 2, the price = 4.50 • for a quantity of 3, the price = 3.50 Order line 1 has an order quantity of 1 and a price of 5.00. If you add a new order line for an order quantity of 2, the system assigns a price of 4.50 to the order line. Even though the total order quantity across the order lines is 3, the system does not apply the price of 3.50 to the order lines.
Cancelling an existing line on the order	If you cancel an existing order line in order maintenance, the system will not reprice the other order lines on the order that are for the same item that was cancelled to find the new quantity price matrix price that applies to the order lines. *Example:* The following QPM prices are defined: • for a quantity of 1, the price = 5.00 • for a quantity of 2, the price = 4.50 • for a quantity of 3, the price = 3.50 Order line 1 has an order quantity of 1 and a price of 3.50 (based on the total order quantity of 3 across the order lines on the order). Order line 2 has an order quantity of 2 and a price of 3.50 (based on the total order quantity of 3 across the order lines on the order). If you cancel order line 2, the system cancels the order line but does not reprice order line 1 to a price of 5.00, even though the total order quantity across the order lines on the order is now 1.

Quantity Price Matrix Examples

The following quantity price matrix examples demonstrate how the system applies quantity price matrix pricing to an order.

- *Example: QPM Detail Pricing by Item Category*
- *Example: QPM Detail Pricing by Item*
- *Example: QPM Special Pricing by Customer*
- *Example: QPM Special Pricing by Customer Price Group*
- *Example: QPM Special Pricing by Source Code*

Example: QPM Detail Pricing by Item Category

The following price matrix details exist for quantity price matrix 2009.

Item Category	Quantity	Price
STCK	20	4.99
STCK	50	3.99
PENC	2	12.79
PENC	5	12.49
PENC	10	11.99

Customer 108 places an order for source code SPR09.

Initial order line entry: The following lines are added to the order:

Item	Item Category	Line Qty	Results
PENC1	PENC	2	The system applies the following quantity price matrix detail to the order line: item category = PENC, quantity = 2, price = *12.79*.
PENC2	PENC	4	The system applies the following quantity price matrix detail to the order line: item category = PENC, quantity = 2, price = *12.79*.
PENC3	PENC	6	The system applies the following quantity price matrix detail to the order line: item category = PENC, quantity = 5, price = *12.49*.
STCK1	STCK	25	the system applies the following quantity price matrix detail to the order line: item category = STCK, quantity = 20, price = *4.99*.
STCK2	STCK	50	The system applies the following quantity price matrix detail to the order lie: item category = STCK, quantity = 50, price = *3.99*.

Repricing: During repricing, the system reevaluates the order lines on the order to find the final quantity price matrix price.

Item	Item Category	Line Qty	Results
PENC1 PENC2 PENC3	PENC PENC PENC	2 4 6	The total order quantity for items in item category PENC is 12. The system applies the following *Quantity Price Matrix Detail* to each order line: item category = PENC, quantity = 10, price = *11.99*.
STCK1 STCK2	STCK STCK	25 50	The total order quantity for items in item category STCK is 75. The system applies the following *Quantity Price Matrix Detail* to each order line: item category = STCK, quantity = 50, price = *3.99*.

Example: QPM Detail Pricing by Item

The following price matrix details exist for quantity price matrix 2009.

Item Category	Item	Quantity	Price
	CS33	1	.89
	DN55	1	19.99
MAGN		25	1.99
MAGN		50	.99
	MG18	10	46.99
	MG18	25	34.99

Customer 108 places an order for source code SPR09.

Initial order line entry: The following lines are added to the order:

Item	SKU	Item Category	Line Qty	Results
CS33		MAGN	25	The system applies the following *Quantity Price Matrix Detail* to the order line: item = CS33, quantity = 1, price = *.89*.
DN55		MAGN	25	The system applies the following *Quantity Price Matrix Detail* to the order line: item = DN55, quantity = 1, price = *19.99*.
MG18	ROSE	MAGN	10	The system applies the following *Quantity Price Matrix Detail* to the order line: item = MG18, quantity = 10, price = *46.99*.
MG18	GOLD	MAGN	15	The system applies the following *Quantity Price Matrix Detail* to the order line: item = MG18, quantity = 10, price = *46.99*.

Repricing: During repricing, the system reevaluates the order lines on the order to find the final quantity price matrix price.

Item	SKU	Item Category	Line Qty	Results
CS33		MAGN	25	The system applies the following *Quantity Price Matrix Detail* to the order line: item = CS33, quantity = 1, price = *.89*.
DN55		MAGN	25	The system applies the following *Quantity Price Matrix Detail* to the order line: item = DN55, quantity = 1, price = *19.99*.
MG18 MG18	ROSE GOLD	MAGN MAGN	10 15	The total order quantity for item MG18 is 25. The system applies the following *Quantity Price Matrix Detail* to each order line: item = MG18, quantity = 25, price = *34.99*.

Example: QPM Special Pricing by Customer

The following price matrix details exist for quantity price matrix 2009.

Item Category	Quantity	Price
STCK	50	3.99
STCK	100	3.49
PENC	50	3.99
PENC	100	3.49

The following price matrix specials exist for quantity price matrix 2009.

Customer	Item Category	Quantity	Price	% Discount
132	STCK	1	3.00	
132	PENC	1		50%

The price override reason code defined in the *Price Override Reason for Price Matrix Customer Specials (K42)* system control value is Q.

Customer 132 places an order for source code SPR09.

Initial order line entry: The following lines are added to the order:

Item	Item Category	Line Qty	Results
STCK1 STCK2	STCK STCK	50 100	The system applies the following *Quantity Price Matrix Customer Special* to the order line: customer = 132, item category = STCK, quantity = 1, price = *3.00*.
PENC1	PENC	50	The system applies the following *Quantity Price Matrix Customer Special* to the order line: customer = 132, item category = PENC, % discount = 50%. In this situation, the price = *2.00* (3.99 detail price - 50% discount = 1.995).
PENC2	PENC	100	The system applies the following *Quantity Price Matrix Customer Special* to the order line: customer = 132, item category = PENC, % discount = 50%. In this situation, the price = *1.75* (3.49 detail price - 50% discount = 1.745).

Repricing: During repricing, the system reevaluates the order lines on the order to find the final quantity price matrix price.

Item	Item Category	Line Qty	Override Reason	Results
STCK1	STCK	50	Q	The system applies the following *Quantity Price Matrix Customer Special* to the order line: customer = 132, item category = STCK, quantity = 1, price = *3.00*. Also, because the order line is priced using a quantity price matrix special that uses customer as a qualifier, the system applies the price override reason code defined in the *Price*

Item	Item Category	Line Qty	Override Reason	Results
STCK2	STCK	100	Q	*Override Reason for Price Matrix Customer Specials (K42)* system control value to each order line. Because this price override reason code is assigned to the order line, the system cannot apply any further discounts or promotions to the order line.
PENC1	PENC	50	Q	The total order quantity for item category PENC is 150. The system applies the following *Quantity Price Matrix Customer Special* to the order line: customer = 132, item category = PENC, % discount = 50%. In this situation, the price = *1.75* (3.49 detail price - 50% discount = 1.745). Also, because the order line is priced using a quantity price matrix special that uses customer as a qualifier, the system applies the price override reason code defined in the *Price Override Reason for Price Matrix Customer Specials (K42)* system control value to each order line. Because this price override reason code is assigned to the order line, the system cannot apply any further discounts or promotions to the order line.
PENC2	PENC	100	Q	

Example: QPM Special Pricing by Customer Price Group

The following price matrix details exist for quantity price matrix 2009.

Item Category	Quantity	Price
STCK	50	3.99
STCK	100	3.49
STCK	150	2.99
ERSR	50	3.99
ERSR	100	3.49
ERSR	150	2.99
ERSR	200	2.49

The following price matrix specials exist for quantity price matrix 2009.

Price Group	Item Category	Item	Quantity	Price	% Discount
TCHR	STCK		1	3.99	
TCHR	ERSR		1		50 %
TCHR		HRT1	1	3.39	

The price override reason code defined in the *Price Override Reason for Price Matrix Customer Specials (K42)* system control value is Q.

Customer 133 places an order for source code SPR09. Customer 133 belongs to customer price group TCHR.

Initial order line entry: The following lines are added to the order:

Item	Item Category	Line Qty	Results
STK1 STK2	STCK STCK	50 100	The system applies the following *Quantity Price Matrix Customer Special* to the order line: customer price group= TCHR, item category = STCK, quantity = 1, price = *3.99*.
ERS1	ERSR	50	The system applies the following *Quantity Price Matrix Customer Special* to the order line: customer price group = TCHR, item category = ERSR, quantity = 1, % discount = 50%. In this situation, the price = *2.00* (3.99 detail price - 50% discount = 2.00).
ERS2	ERSR	100	The system applies the following *Quantity Price Matrix Customer Special* to the order line: customer price group = TCHR, item category = ERSR, quantity = 1, % discount = 50%. In this situation, the price = *1.75* (3.49 detail price - 50% discount = 1.745).
HRT1	ERSR	100	The system applies the following *Quantity Price Matrix Customer Special* to the order line: customer price group = TCHR, item = HRT1, quantity = 1, price = *3.39*.

Repricing: During repricing, the system reevaluates the order lines on the order to find the final quantity price matrix price.

Item	Item Category	Line Qty	Override Reason	Results
STCK1	STCK	50	Q	The system applies the following *Quantity Price Matrix Customer Special* to the order line: customer price group = TCH, item category = STCK, quantity = 1, price = *3.99*. Also, because the order line is priced using a quantity price matrix special that uses customer price group as a qualifier, the system applies the *Price Override Reason for Price Matrix Customer Specials (K42)* to each order line. Because this price override reason code is assigned to the order line, the system cannot apply any further discounts or promotions to the order line.
STCK2	STCK	100	Q	See above.

Item	Item Category	Line Qty	Override Reason	Results
ERS1	ERSR	50	Q	The total order quantity for item category ERSR (including item HRT1) is 250. The system applies the following Quantity Price Matrix Customer Special to the order line: customer price group = TCHR, item category = ERSR, % discount = 50%. In this situation, the price = *1.25* (2.49 detail price - 50% discount = 1.245). Also, because the order line is priced using a quantity price matrix special that uses customer as a qualifier, the system applies the *Price Override Reason for Price Matrix Customer Specials (K42)* to each order line. Because this price override reason code is assigned to the order line, the system cannot apply any further discounts or promotions to the order line.
ERS2	ERSR	100	Q	See above.

Item	Item Category	Line Qty	Override Reason	Results
HRT1	ERSR	100	Q	The system applies the following *Quantity Price Matrix Customer Special* to the order line: customer price group = TCHR, item = HRT1, quantity = 1, price = *3.39*. **Note:** The system includes the quantity for this order line in the total quantity for item category ERSR. Because a special price is defined for item HRT1, the system does not apply the special discount defined for the customer price group and item category. Because the order line is priced using a quantity price matrix special that uses customer price group as a qualifier, the system applies the *Price Override Reason for Price Matrix Customer Specials (K42)* to the order line. Because this price override reason code is assigned to the order line, the system cannot apply any further discounts or promotions to the order line.

Example: QPM Special Pricing by Source Code

The following price matrix details exist for quantity price matrix 2009.

Item Category	Quantity	Price
STCK	50	3.99

Item Category	Quantity	Price
STCK	100	3.49

The following price matrix special exists for quantity price matrix 2009.

Source Code	Item	Quantity	% Discount	Exp Date
SUM09	SKU1	1	75 %	08/15/09

On 07/12/09, customer 132 places an order for source code SUM09.

Initial order line entry: The following lines are added to the order:

Item	Item Category	Line Qty	Results
SKU1	STCK	150	The system applies the following *Quantity Price Matrix Source Special* to the order line: source code = SUM09, item = SKU1, quantity = 1, % discount = 75%. In this situation, the price = .87 (3.49 detail price - 75% discount = .8725).

Repricing: During repricing, the system reevaluates the order line on the order to find the final quantity price matrix price.

Item	Item Category	Line Qty	Results
SKU1	STCK	150	The system applies the following *Quantity Price Matrix Source Special* to the order line: source code = SUM09, item = SKU1, quantity = 1, % discount = 75%. In this situation, the price = .87 (3.49 detail price - 75% discount = .8725). The system does not assign the *Price Override Reason for Price Matrix Customer Specials (K42)* to the order line because the discount does not use customer or customer price discount are part of the criteria. If the customer placed this order on 08/16/09, the system would not qualify for the special source discount because the discount expired on 08/15/09.

Quantity Price Matrix Troubleshooting

If the system is not applying the correct quantity price matrix price to an order line, check the following information.

Quantity price matrix set up correctly? Verify that quantity price matrix pricing is set up correctly. See *Quantity Price Matrix Setup* for the system control values and menu options that you should verify.

Correct quantity price matrix used? Verify that the price that you expected is defined in the quantity price matrix that is currently in use. See *Determining the Quantity Price Matrix to Use* for more information on how the system decides which quantity price matrix to use.

Matching currencies? If the *Multi Currency by Offer (E03)* system control value is selected, the currency defined for the offer associated with the source code on the order header must match the currency code defined for the quantity price matrix.

Does the source code allow repricing? To do *End of Order Quantity Price Matrix Pricing* during repricing, the Price method field for the source code on the order header must be set to *Reg Plus Reprice*.

Does the order line qualify for the quantity price matrix? Verify that the order line qualifies for the quantity price matrix.

- If the order line has a manual price override, the system uses the manual price override as the price for the order line.
- If the order line is for a negative order quantity, the system does not apply a quantity price matrix price to the order line; the order line will use the pricing hierarchy defined in this *Pricing Values (B31)* system control value to find the price for the order line.
- If the order line is for a BOGO (Buy One, Get One) discount, the system uses the BOGO discount as the price for the order line.
- Look at the *Work with Order Line Screen (Changing/Adding an Item)* to review the pricing method used to price the order line. If the order line was not priced using a quantity price matrix price, take a look at the pricing hierarchy defined in the *Pricing Values (B31)* system control value to review the sequence in which the system applies line level pricing to an order line. Also, if the *Best Way Pricing (A78)* system control value is selected, the system applies the best price, and not necessarily the quantity price matrix price, to the order line.
- Review the *Quantity Price Matrix Price Hierarchy* to determine if a different quantity price matrix price from the one you expected was applied to the order. The system applies quantity price matrix pricing in the following order: QPM customer specials, QPM source specials, QPM base details.
- Check the order line quantity against the quantity price matrix quantity. To qualify, the order line quantity must match or be greater than the quantity price matrix price. For example, if the order line quantity is 2, the quantity price matrix quantity must be 2 or 1 to apply it to the order line. If the quantity price matrix quantity is greater than the order line quantity, the order line does not qualify for the price.

Does repricing change the price of the order line? If the *Quantity Price Matrix Pricing (K41)* system control value is selected, the system performs *End of Order Quantity Price Matrix Pricing*. The system checks the total order quantity for the item across the lines on the order. During repricing, the system applies the quantity price matrix price to the order line based on the total order quantity of the item across order lines. For example, if the order line quantity is 2, but the item also exists on another order line for a quantity of 1, the quantity price matrix quantity can be 3 or less to apply it to the order line.

- If the order line is priced using a quantity price matrix customer special, the system includes the order line in the total quantity used for quantity price matrix pricing calculated during repricing.
- If the order line contain a manual price override, the system includes the order line in the total quantity used for quantity price matrix pricing calculated during repricing.
- If the order line is for a negative order quantity, the system does not include the order line in the total quantity used for quantity price matrix pricing calculated during repricing.
- If the order line is for a BOGO (Buy One/Get One) discount, the system does not include the order line in the total quantity used for quantity price matrix pricing calculated during repricing.

Quantity price matrix customer special applied? If a *Quantity Price Matrix Customer Special* is applied to the order line, the order line does not qualify for other discounts and promotions, expect for a source % discount. Order lines that are priced using a quantity price matrix customer special are assigned the price override reason code defined in the *Price Override Reason for Price Matrix Customer Specials (K42)* system control value. *Note:* If the *Price Override Reason for Price Matrix Customer Specials (K42)* system control value is blank, the system does not assign a price override reason code to order lines that are priced using a quantity price matrix customer special. In this situation, these order lines qualify for other discounts and promotions.

Applied discount, premium, or promotion? The system decides whether an order qualifies for a discount, premium, or promotion based on the quantity price matrix price that is applied to each order line during repricing and not during initial order entry. See *End of Order Quantity Price Matrix Pricing*.

Was the order modified in order maintenance? During order maintenance, the system does line-level quantity price matrix pricing, but does not do end-of-order quantity price matrix pricing. Because of this, the system may price an order line using a quantity price matrix price, but does not evaluate the total order quantity for an item on the order across order lines. See *Quantity Price Matrix Pricing in Order Maintenance*.

Work with Quantity Price Matrix Screen

Purpose: Use this screen to create and work with quantity price matrix price breaks.

How to display this screen: Enter *WQPM* in the Fast path field or select Work with Quantity Price Matrix from a menu.

Column Sort: You can sort on any column on this screen by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Quantity price matrixes first display on this screen in alphanumeric matrix code sequence. To review the quantity price matrix with the most recent effective date, click on the Effective Date field until an arrow pointing down displays next to it to display quantity price matrixes in descending effective date sequence.

For more information: See *Determining the Quantity Price Matrix to Use* for more information on how the system decides which quantity price matrix to use on an order.

Field	Description
Matrix	A unique code for a quantity price matrix. Quantity price matrix codes are defined in and validated against the QPM Header table. *Search:* Enter a full or partial matrix code to display quantity price matrixes in alphanumeric order, beginning with your entry. Alphanumeric, 4 positions; optional.

Field	Description
Active	Indicates if the quantity price matrix is active for use. • *Active* = The quantity price matrix is active and can be used for pricing. • *Inactive* = The quantity price matrix is inactive and cannot be used for pricing. *Search mode:* Select a status to display quantity price matrixes that match your entry. Optional.
Effective Date	The date when the quantity price matrix becomes effective. *Search mode:* Enter a valid date to display quantity price matrixes that match your entry. Alphanumeric, 6 positions (in user date format); optional.
Description	A description of the quantity price matrix. *Search mode:* Enter a full or partial description to display quantity price matrixes that include your entry. Alphanumeric, 30 positions; optional.
Currency	A code for the currency associated with the quantity price matrix. This field displays only if the *Multi Currency by Offer (E03)* system control value is *selected*. Currency codes are defined and validated against the Currency table. See Working with Currency (WCUR). *Search mode:* Select a currency code to display quantity price matrixes that match your entry. Optional.

Screen Option	Procedure
Create a quantity price matrix	Select *Create* to advance to the Create Quantity Price Matrix Screen.

Note:

You can also create a new quantity price matrix using the *Copy* option. This method allows you to copy the details of an existing quantity price matrix to the quantity price matrix you are creating. See Copy Quantity Price Matrix Window.

Screen Option	Procedure
Change a quantity price matrix	In the Action field, select *Change* for a quantity price matrix to advance to the Change Quantity Price Matrix screen. At this screen, you can change any field except the quantity price matrix code. See the *Create Quantity Price Matrix Screen* for field descriptions.
Delete a quantity price matrix	In the Action field, select *Delete* for a quantity price matrix to advance to the Confirm Delete window. Select *Yes* to confirm the delete; otherwise, select *No* to cancel the delete. When you delete a quantity price matrix, the system deletes all of the associated details and specials defined for the matrix.
Copy the details defined for one quantity price matrix to a new quantity price matrix	In the Action field, select *Copy* for a quantity price matrix to advance to the *Copy Quantity Price Matrix Window*.
Work with the details of a quantity price matrix	In the Action field, select *Details* for a quantity price matrix to advance to the *Work with Quantity Price Matrix Details Screen*.
Work with the specials defined for a quantity price matrix	In the Action field, select *Specials* for a quantity price matrix to advance to the *Work with Quantity Price Matrix Specials Screen*.

Create Quantity Price Matrix Screen

Purpose: Use this screen to create a quantity price matrix.

How to display this screen: Select *Create* on the *Work with Quantity Price Matrix Screen*.

Field	Description
Matrix	A unique code for a quantity price matrix. Quantity price matrix codes are defined in and validated against the QPM Header table. Alphanumeric, 4 positions. Create: required. Change: display-only.
Description	A description of the quantity price matrix. Alphanumeric, 30 positions; required.
Active	Indicates if the quantity price matrix is active for use. • *Active* = The quantity price matrix is active and can be used for pricing. • *Inactive* = The quantity price matrix is inactive and cannot be used for pricing. Required.
Effective Date	The date when the quantity price matrix becomes effective. Alphanumeric, 6 positions (in user date format); required.

Field	Description
Currency	A code for the currency associated with the quantity price matrix. This field displays only if the *Multi Currency by Offer (E03)* system control value is *selected*. Currency codes are defined and validated against the Currency table. See *Working with Currency (WCUR)*. Required.

Copy Quantity Price Matrix Window

Purpose: Use this window to copy the details and specials of one quantity price matrix to a new quantity price matrix.

To copy:

1. Enter a code in the *Matrix* field. The system validates that the quantity price matrix code you define does not already exist in the QPM Header table.
2. Enter a description of the quantity price matrix in the *Description* field.
3. Enter the date when the quantity price matrix becomes effective in the *Effective Date* field.
4. Select *OK*. The system validates your entries and displays an error message if a value you entered in invalid. Correct any errors and select *OK* again.
5. The system returns you to the *Work with Quantity Price Matrix Screen* and displays the new quantity price matrix in the bottom half of the screen. All of the details and specials defined for the quantity price matrix that you copied have been applied to the new quantity price matrix. Also, the Status and Currency defined for the quantity price matrix that you copied are applied to the new quantity price matrix.

How to display this screen: Select *Copy* for a quantity price matrix at the *Work with Quantity Price Matrix Screen*.

Field	Description
Matrix	A unique code for a quantity price matrix. The system validates that the matrix code you enter does not already exist. Quantity price matrix codes are defined in and validated against the QPM Header table. Alphanumeric, 4 positions; required.
Description	A description of the quantity price matrix. Alphanumeric, 30 positions; required.
Effective Date	The date when the quantity price matrix becomes effective. Alphanumeric, 6 positions (in user date format); required.

Work with Quantity Price Matrix Details Screen

Purpose: Use this screen to work with the base quantity price breaks defined for a quantity price matrix. You can also define special quantity price breaks for a customer, customer price group, or source code at the *Work with Quantity Price Matrix Specials Screen*.

Quantity price matrix details are QPM base prices defined for a specific item and SKU, item, or item category. See *Quantity Price Matrix Detail* for more information on the criteria you can define for an item to qualify for a quantity price matrix detail.

> **Note:**
>
> You cannot create more than one quantity price matrix detail for the same item category and quantity, item and quantity, or item and SKU and quantity.

For more information: See *Determining the QPM Price to Use* for more information on how the system uses the *Quantity Price Matrix Price Hierarchy* to find the quantity price matrix price to apply to an order line.

Uploading quantity price matrix pricing from an external system: You can also upload quantity price matrix details from an external system; see *Work with Pricing Upload (WPUP)* for an overview.

How to display this screen:

- Select *Details* for an existing quantity price matrix at the *Work with Quantity Price Matrix Screen*.
- Select *Details* at the *Work with Quantity Price Matrix Specials Screen*.

Column sort: You can sort on any column on this screen by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Quantity price matrix details first display on this screen in ascending alphanumeric order by item, SKU, and item category sequence, then by ascending quantity.

Field	Description
Matrix	The code of the quantity price matrix whose details you are reviewing. Alphanumeric, 4 positions; display-only.
Description	A description of the quantity price matrix whose details you are reviewing. Alphanumeric, 30 positions; display-only.
Category	A code for the item category associated with the quantity price matrix detail. Item category codes are defined in and validated against the Item Category table. *Search:* Enter a full or partial item category code and select *OK* to display quantity price matrix details that contain your entry. Alphanumeric, 4 positions; optional.
Item	A code for the item associated with the quantity price matrix detail. *Search:* Enter a full or partial item code to display quantity price matrix details that contain your entry. Alphanumeric, 12 positions; optional.

Field	Description
SKU	A code for the SKU of the item associated with the quantity price matrix detail. *Search:* Enter a full or partial SKU code to display quantity price matrix details that contain your entry. Alphanumeric, three 4-position fields; optional.
Qty	The quantity of the item that must be ordered to qualify for the quantity price matrix detail. The item qualifies for the quantity price matrix detail if the order line quantity is less than or equal to the quantity price matrix detail. See *Determining the QPM Price to Use*. *Search:* Enter a quantity to display quantity price matrix details that match your entry. Numeric, 5 positions; optional.
Price	The price of the item when the quantity specified is ordered. *Search:* Enter a price to display quantity price matrix details that match your entry. Numeric, 13 positions with a 2-place decimal; optional.
Tax Inclusive Price	The price of the item on orders subject to tax-inclusive pricing when the quantity specified is ordered. This field displays only if the *Tax Included in Price (E70)* system control value is selected. *Search:* Enter a price to display quantity price matrix details that match your entry. Numeric, 13 positions with a 2-place decimal; Optional.

Screen Option	Procedure
Create a quantity price matrix detail	Select *Create* to advance to the *Create Quantity Price Matrix Details Screen*.
Change a quantity price matrix detail	In the Action field, select *Change* for a quantity price matrix detail to advance to the Change Quantity Price Matrix Details screen. At this screen you can change the Price and Tax Inclusive Price fields. See the *Create Quantity Price Matrix Details Screen* for field descriptions.
Delete a quantity price matrix detail	In the Action field, select *Delete* for a quantity price matrix detail to advance to the Confirm Delete window. Select *Yes* to confirm the delete; otherwise, select *No* to cancel the delete.
Create and work with the specials defined for the quantity price matrix	Select *Specials* to advance to the *Work with Quantity Price Matrix Specials Screen*.

Create Quantity Price Matrix Details Screen

Purpose: Use this screen to create a quantity price matrix detail.

How to display this screen: Select *Create* at the *Work with Quantity Price Matrix Details Screen*.

Field	Description
Matrix	The code of the quantity price matrix whose details you are reviewing. Alphanumeric, 4 positions; display-only.
Description	A description of the quantity price matrix whose details you are reviewing. Alphanumeric, 30 positions; display-only.
Category	A code for the item category associated with the quantity price matrix detail. Item category codes are defined in and validated against the Item Category table. When creating a quantity price matrix detail, you must define an item category or item. You cannot define an item category and item for a quantity price matrix detail. Alphanumeric, 4 positions; required if the Item field is blank.
Item	A code for the item associated with the quantity price matrix detail. Item codes are defined in and validated against the Item table. You can prompt on this field to advance to the Select Item/SKU window. This window displays the first 500 item/SKU records; use the search fields to refine your search results. When creating a quantity price matrix detail, you must define an item category or item. You cannot define an item category and item for a quantity price matrix detail. Alphanumeric, 12 positions; required if the Category field is blank.
SKU	A code for the SKU of the item associated with the quantity price matrix detail. SKU codes are defined in and validated against the SKU table. You can prompt on this field to advance to the Select Item/SKU window. This window displays the first 500 item/SKU records; use the search fields to refine your search results. *Add Mode:* When creating a quantity price matrix detail: 1. If you define a SKU for the item, only the SKU specified qualifies for the quantity price matrix detail. 2. If you do not define a SKU for the item, all of the SKUs for the item qualify for the quantity price matrix detail. Alphanumeric, three 4-position fields; optional.
Qty	The quantity of the item that must be ordered to qualify for the quantity price matrix detail. The item qualifies for the quantity price matrix detail if the order line quantity is less than or equal to the quantity price matrix detail. See *Determining the QPM Price to Use*. You cannot create more than one quantity price break for the same item category and quantity, item and quantity, or item and SKU and quantity. Numeric, 5 positions; required.
Price	The price of the item when the quantity specified is ordered. You cannot enter a negative price. Numeric, 13 positions with a 2-place decimal; required.

Field	Description
Tax Inclusive Price	The price of the item on orders subject to tax-inclusive pricing when the quantity specified is ordered. You cannot enter a negative price. This field displays only if the *Tax Included in Price (E70)* system control value is selected. Numeric, 13 positions with a 2-place decimal; optional.

Work with Quantity Price Matrix Specials Screen

Purpose: Use this screen to work with the specials defined for a quantity price matrix. At this screen you can work with customer specials and source specials. You can use the *Work with Quantity Price Matrix Details Screen* to work with the base quantity price breaks defined for a quantity price matrix.

- Quantity price matrix customer specials are QPM discount prices that use customer or customer price group as a qualifier. See *Quantity Price Matrix Customer Special* for more information on the criteria you can define for an item to qualify for a quantity price matrix customer special.
- Quantity price matrix source specials are QPM discount prices that use source code, and NOT customer or customer price group, as a qualifier. See *Quantity Price Matrix Source Special* for more information on the criteria you can define for an item to qualify for a quantity price matrix source special.

For more information: See *Determining the QPM Price to Use* for more information on how the system uses the *Quantity Price Matrix Price Hierarchy* to find the quantity price matrix price to apply to an order line.

Uploading quantity price matrix specials from an external system: You can also upload quantity price matrix specials from an external system; see *Work with Pricing Upload (WPUP)* for an overview.

How to display this screen:

- Select *Specials* for a quantity price matrix at the *Work with Quantity Price Matrix Screen*.
- Select *Specials* for a quantity price matrix at the *Work with Quantity Price Matrix Details Screen*.

Column sort: You can sort on any column on this screen by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Initial display: Quantity price matrix specials first display on this screen in the following hierarchy:

- specials that use source code as the qualifier
- specials that use customer price group as the qualifier
- specials that use customer price group and source code as the qualifier
- specials that use customer as the qualifier
- specials that use customer and source code as the qualifer

Within this hierarchy, quantity price matrix specials display in ascending item category, item, SKU and ascending quantity sequence.

Field	Description
Matrix	The code of the quantity price matrix whose specials you are reviewing. Alphanumeric, 4 positions; display-only.
Description	The description of the quantity price matrix whose specials you are reviewing. Alphanumeric, 30 positions; display-only.
Customer	A code for the sold to customer associated with a quantity price matrix special. *Search:* Enter a customer number to display quantity price matrix specials in numeric sold to customer number order. Numeric, 9 positions; optional.
Price Group	The customer price group associated with a quantity price matrix special. *Search:* Enter a customer price group to display quantity price matrix specials in alphanumeric customer price group order. Alphanumeric, 4 positions; optional.
Source	A code for the source code associated with a quantity price matrix special. *Search:* Enter a valid source code to display quantity price matrix specials that contain your entry. Alphanumeric, 9 positions; optional.
Category	A code for the item category associated with a quantity price matrix special. *Search:* Enter a valid item category code to display quantity price matrix specials that contain your entry. Alphanumeric, 4 positions; optional.
Item	A code for the item associated with a quantity price matrix special. *Search:* Enter a valid item code to display quantity price matrix specials that contain your entry. Alphanumeric, 12 positions; optional.
SKU	A code for the SKU of the item associated with a quantity price matrix special. *Search:* Enter a valid SKU code to display quantity price matrix specials that contain your entry. Alphanumeric, three 4-position fields; optional.
Qty	The quantity of the item that must be ordered to qualify for the quantity price matrix special. See *Determining the QPM Price to Use*. *Search:* Enter a quantity to display quantity price matrix specials that match your entry. Numeric, 5 positions; optional.
Price	The price of the item when it qualifies for the quantity price matrix special. *Search:* Enter a price to display quantity price matrix specials that match your entry. Numeric, 13 positions with a 2-place decimal; optional.

Field	Description
Tax Inclusive Price	The price of the item on orders subject to tax-inclusive pricing when it qualifies for the quantity price matrix special. This field displays only if the *Tax Included in Price (E70)* system control value is selected. *Search:* Enter a price to display quantity price matrix specials that match your entry. Numeric, 13 positions with a 2-place decimal; Optional.
% Discount	The percentage off the quantity price matrix detail price when the item ordered is eligible for the quantity price matrix special. For example, *10* means the item qualifies for a 10% discount. *Example:* The % discount is based on the following criteria: • customer price group = QPM1 • item category = HG • quantity = 2 • % discount = 10 The 10% discount is based on the quantity price matrix detail defined for item category HG and quantity 2: • item category = HG • quantity = 2 • price = 10.00 In this example, the 10% discount is a 1.00 discount (10.00 QPM detail - 10% QPM special = 9.00 discount price) If a quantity price matrix detail is not defined for item category HG and quantity 2, the system uses the next lowest quantity for the item category (in this example, the system uses item category HG and quantity 1). See Calculating the QPM Price for more information on how the system finds the price for a quantity price matrix detail and quantity price matrix special. *Search:* Enter a percentage to display quantity price matrix specials that match your entry. Numeric, 4 positions with a 2-place decimal; optional.
Exp Date	The date the quantity price matrix special expires. The expiration date cannot be earlier than the Effective date defined for the quantity price matrix. *Search:* Enter a date and select *Search* to display quantity price matrix specials that match your entry. Alphanumeric, 6 positions (in user date format); Optional.

Screen Option	Procedure
Create a quantity price matrix special	Select *Create* to advance to the Create Quantity Price Matrix Specials Screen.
Change a quantity price matrix special	In the Action field, select *Change* for a quantity price matrix special to advance to the Change Quantity Price Matrix Special screen. At this screen, you can change the Price, Tax Inclusive Price, % Discount, and Exp Date fields. See the Create Quantity Price Matrix Specials Screen for field descriptions.

Screen Option	Procedure
Delete a quantity price matrix special	In the Action field, select *Delete* for a quantity price matrix special to advance to the Confirm Delete window. Select *Yes* to confirm the delete or select *No* to cancel the delete.
Review quantity price matrix details	Select *Details* to advance to the *Work with Quantity Price Matrix Details Screen*.

Create Quantity Price Matrix Specials Screen

Purpose: Use this screen to create a quantity price matrix special.

How to display this screen: Select *Create* on the *Work with Quantity Price Matrix Specials Screen*.

Field	Description
Matrix	The code of the quantity price matrix whose specials you are reviewing. Alphanumeric, 4 positions; display-only.
Description	The description of the quantity price matrix whose specials you are reviewing. Alphanumeric, 30 positions; display-only.
Customer	A code for the sold to customer associated with a quantity price matrix special. Sold to customers are defined in and validated against the Customer Sold To table. You can enter a sold to customer or customer price group for a quantity price matrix special, but not both. Numeric, 9 positions; required if the Price Group and Source fields are blank.
Price Group	The customer price group associated with a quantity price matrix special. Customer price groups are defined in and validated against the Customer Price Group table. You can enter a sold to customer or customer price group for a quantity price matrix special, but not both. Alphanumeric, 4 positions; required if the Customer and Source fields are blank.
Source	A code for the source code associated with a quantity price matrix special. Source codes are defined in and validated against the Source table. Alphanumeric, 9 positions; required if the Customer and Price Group fields are blank.
Category	A code for the item category associated with a quantity price matrix special. Item category codes are defined in and validated against the Item Category table. You can enter an item category or item for a quantity price matrix special, but not both. If you enter an item category, you must also define a sold to customer, customer price group, or source code. Alphanumeric, 4 positions; required if the Item field is blank.

Field	Description
Item	A code for the item associated with a quantity price matrix special. Item codes are defined in and validated against the Item table. You can prompt on this field to advance to the Select Item/SKU window. This window displays the first 500 item/SKU records; use the search fields to refine your search results. You can enter an item category or item for a quantity price matrix special, but not both. If you enter an item, you must also define a sold to customer, customer price group, or source code. Alphanumeric, 12 positions; required if the Category field is blank.
SKU	A code for the SKU of the item associated with a quantity price matrix special. SKU codes are defined in and validated against the SKU table. You can prompt on this field to advance to the Select Item/SKU window. This window displays the first 500 item/SKU records; use the search fields to refine your search results. If you enter a SKU, you must also enter the item associated with the SKU in the Item field. If you do not define a SKU code for an item that has SKUs, all of the SKUs defined for the item are associated with the quantity price matrix special. Alphanumeric, three 4-position fields; optional.
Quantity	The quantity of the item that must be ordered to qualify for the quantity price matrix special. See *Determining the QPM Price to Use*. You cannot create more than one quantity price matrix special using the same criteria. Numeric, 5 positions; required.
Price	The price of the item when it qualifies for the quantity price matrix special. You can enter a price or % discount for a quantity price matrix special, but not both. Numeric, 13 positions with a 2-place decimal; required if the % Disc field is blank.
Tax Inclusive Price	The price of the item on orders subject to tax-inclusive pricing when it qualifies for the quantity price matrix special. This field displays only if the *Tax Included in Price (E70)* ysystem control value is selected. Numeric, 13 positions with a 2-place decimal; Optional.

Field	Description
% Discount	The percentage off the quantity price matrix detail price when the item ordered is eligible for the quantity price matrix special. For example, *10* means the item qualifies for a 10% discount. *Example:* The % discount is based on the following criteria: • customer price group = QPM1 • item category = HG • quantity = 2 • % discount = 10 The 10% discount is based on the quantity price matrix detail defined for item category HG and quantity 2: • item category = HG • quantity = 2 • price = 10.00 In this example, the 10% discount is a 1.00 discount (10.00 QPM detail - 10% QPM special = 9.00 discount price) If a quantity price matrix detail is not defined for item category HG and quantity 2, the system uses the next lowest quantity for the item category (in this example, the system uses item category HG and quantity 1). See *Calculating the QPM Price* for more information on how the system finds the price for a quantity price matrix detail and quantity price matrix special. You can enter a price or % discount for a quantity price matrix special, but not both. Numeric, 4 positions with a 2-place decimal; required if the Price or Tax Inclusive Price fields are blank.
Exp Date	The date the quantity price matrix special expires. The expiration date cannot be earlier than the Effective date defined for the quantity price matrix. Alphanumeric, 6 positions (in user date format); Optional.

Work with Promotional Pricing Groups (WPRG)

Purpose: Use the Work with Promotional Pricing Groups function to create and change promotional pricing groups and define the items that the groups include. You can use these groups for promotional pricing. You can promote one or more incentive items at a special price or at no charge if a customer orders a promotional item, an item from a promotional group, or a specified dollar amount.

Promotional pricing: You can use a promotional price group to identify:

- *required items:* the items that for the customer must order to be eligible for a promotional price incentive, and/or
- *incentive items:* the items that you are offering for a reduced or incentive price if the order meets the promotion price requirements.

For example, if you set up two groups, you might set up promotional pricing to offer the customer:

- a reduced or incentive price on any item from group 1 with a qualifying purchase of items from group 1

- a reduced or incentive price on any item from group 1 with a qualifying purchase of items from group 2
- a reduced or incentive price on a specific item with a qualifying purchase of items from group 2
- a reduced or incentive price on a limited quantity of items from group 2 based on a qualifying merchandise dollar value on the order

Once you define the promotional pricing group and specify the items that will be included in each group, use *Work with Promotional Pricing (WPRP)* to define the requirements the customer's order must meet to be eligible for the incentive. For example, you also need to specify a source code or offer for the promotional pricing record.

See *Upselling with Promotional Pricing* for more information on how promotional pricing incentive items are presented in order entry.

> **Note:**
>
> It is not necessary to use promotional pricing groups in order to use promotional pricing. For example, you can use promotional pricing to offer an item at a special price or at no charge when the customer uses a specific source code and meets an order dollar minimum value. See *Work with Promotional Pricing (WPRP)* for more information.

In this topic:

- *Work with Promotional Pricing Groups Screen*
- *Promo Pricing Group Screen (Add Mode)*
- *Work with Promotion Group Details Screen*

Work with Promotional Pricing Groups Screen

How to display this screen: Enter *WPRG* in the Fast Path field at the top of any menu or select the Work With Promotional Pricing Groups option from a menu.

Field	Description
Group	Allows you to enter the code for the promotional pricing group. Numeric, 3 positions; optional.
Description	Allows you to enter a full or partial description of the promotional pricing group. Alphanumeric, 30 positions; optional.

Screen Option	Procedure
Create a promotional pricing group	Select *Create* to advance to the *Promo Pricing Group Screen (Add Mode)*.

Screen Option	Procedure
Change a promotional pricing group	Select *Change* for a group to advance to the Promo Pricing Group screen in Change mode. See *Promo Pricing Group Screen (Add Mode)* for field descriptions. You can change only the Description field.
Delete a promotional pricing group	Select *Delete* for a group to delete it.
Display a promotional pricing group	Select *Display* for a group to advance to the Promo Pricing Group screen in Display mode. See *Promo Pricing Group Screen (Add Mode)* for field descriptions. You cannot change any information on this screen.

Promo Pricing Group Screen (Add Mode)

To create: Select *Create* on the *Work with Promotional Pricing Groups Screen*.

Field	Description
Group	A unique code that represents the pricing group. Promotional price groups categorize the items from which a customer must order to receive an incentive or free item, or an item at a special price. Numeric, 3 positions. Add mode: required. Change mode: display-only.
Description	A description of the pricing group. Alphanumeric, 30 positions; required.

Work with Promotion Group Details Screen

How to display this screen: Complete the *Promo Pricing Group Screen (Add Mode)*, or select *Details* for a group at the *Work with Promotional Pricing Groups Screen*. You can also display this screen by selecting *Add/Change* at the *Promotion Pricing Screen (Add Mode)*, (Change Mode), or (Display Mode).

Field	Description
Item	The number of the item that belongs to this promotional pricing group. The item you enter is validated against the Item table. Alphanumeric, 12 positions; required.
Clr/Size/Wdth	If the item has SKUs, enter the specific SKU of the item that belongs to this promotional pricing group. The SKU you enter is validated against the Item/SKU table. If you do not know the specific SKUs for an item, or if you would like to make all SKUs eligible, you can leave this field blank. Alphanumeric, 14 positions; optional.

To add: This screen displays in Add mode. The cursor is at the Item field, so you can begin adding item information. Once you enter an item, the information is displayed beneath the blank fields, so you can continue to add more item information.

To change or delete: If any items have been previously entered in this table, they are displayed. To change item information, select *Change* to switch to Change mode. You can type over or delete existing information.

Work with Promotional Pricing (WPRP)

Purpose: Use this function to create and change a promotional pricing record. Promotional pricing allows you to promote one or more incentive items at a special price, at a discount off the regular price, or at no charge, if the customer meets the eligibility requirements.

You define in the promotional pricing record:

- the *requirements* a customer's order must meet to be eligible to receive an incentive item. This can include ordering:
- from a specific *source code* or *offer*, and
- from a *promotional group*, or
- a *promotional item*, or
- a specified merchandise *dollar amount*
- *incentive details*, which can include ordering:
- from an incentive group or an incentive item at *no charge*, or
- from an incentive group or an incentive item at a *special price*, or
- from an incentive group or incentive item with a dollar or percentage *discount*

You specify the items that will be available as part of a promotional pricing group using *Work with Promotional Pricing Groups (WPRG)*. You then use the Work with Promotional Pricing option to define the criteria that will make a customer eligible for the incentive. However, it is not necessary to use promotional groups as part of promotional pricing; you can also base the promotion on a specific minimum order dollar value, item, offer, or source code.

> **Note:**
>
> Once you have added an incentive item to an order, the system will not reprice it or reassess tax, regardless of changes to the shipping address, customer tax status, etc.

In order entry: Promotional windows will display in Order Entry only if the order type (see *Establishing Order Types (WOTY)*) indicates to display promotional windows, and if the source code on the order allows promotional pricing. For example, you can suppress promotional windows from displaying for mail or fax orders. See *Upselling with Promotional Pricing* for more information.

> **Note:**
>
> If you have set up pop-up window messages in the Source Code table, in addition to promotional windows, the windows resulting from the Source Code table appear first, before the promotional windows. See *Working with Source Codes (WSRC)*.

In this topic:

- *Work with Promotion Pricing Screen*
- *Promotion Pricing Screen (Add Mode)*

Work with Promotion Pricing Screen

How to display this screen: Enter *WPRP in the* Fast Path field at the top of any menu or select Work with Promotional Pricing from a menu.

Field	Description
ID	The code that identifies a promotional pricing record. Alphanumeric, 5 positions; optional.
Ofr (Offer)	A code representing a catalog or advertisement that you use to present merchandise to your customers. Offers are defined in and validated against the Offer table. See *Working with Offers (WOFR)*. Alphanumeric, 3 positions; optional.
Source (Source code)	A code representing a group of customers to whom you sell. Source codes are defined in and validated against the Source table. See *Working with Source Codes (WSRC)*. Alphanumeric, 9 positions; optional.
Promotion type	The type of promotion. Valid values are: • *Group* • *Item* • *Order/Dollar* Optional.
Incentive type	The type of incentive for the promotion. Valid values are: • *Item Incentive* • *Group Incentive* Optional.
Seq #	The sequence number specified at the *Promotion Pricing Screen (Add Mode)*. Numeric, 3 positions; display-only.

Screen Option	Procedure
Create a promotional pricing record	Select *Create* to advance to the *Promotion Pricing Screen (Add Mode)*.

Screen Option	Procedure
Change a promotional pricing record	Select *Change* for a promotion to advance to the Promotion Pricing screen in Change mode. At this screen, you can change anything but the Promotion ID. See *Promotion Pricing Screen (Add Mode)* for field descriptions.
Delete a promotional pricing record	Select *Delete* for a promotion to delete it.
Display a promotional pricing record	Select *Display* for a promotion to advance to the Promotion Pricing screen in Display mode. At this screen, you cannot change any information. See *Promotion Pricing Screen (Add Mode)* for field descriptions.

Promotion Pricing Screen (Add Mode)

To create: Select *Create* on the *Work with Promotion Pricing Screen*.

> **Note:**
>
> Your entries on this screen control the window and screen flow in order entry when an order is eligible for promotional pricing. See *Upselling with Promotional Pricing* for an overview.

Field	Description
Promotion ID	A code to identify the promotion. Alphanumeric, 5 positions. Add mode: required. Change mode: display-only.
Seq #	Not currently implemented. Numeric, 3 positions; optional.
Complete either the Offer or Source code field:	
Offer	If you want this promotion to be determined by the offer, enter the code for the offer (catalog, advertisement, etc.) from which the customer must order to be eligible for this promotion. See *Working with Offers (WOFR)*. **Note:** In order to receive promotional pricing for the specified offer, make sure you create item/SKU offer prices for the items/SKUs assigned to the offer. Alphanumeric, 3 positions; required, if you do not enter a source code.

Field	Description
Source code	If you want this promotion to be determined by source code, enter the source code that the customer must use to be eligible for this promotion. See *Working with Source Codes (WSRC)*. **Note:** In order to receive promotional pricing for the specified source code, make sure you create item/SKU offer prices for the items/SKUs assigned to the offer associated with the source code. Alphanumeric, 9 positions; required, if you did not enter an offer.
Type of promotion	Defines the order requirements for a particular promotion. Valid values are: *Group* = Orders that include the required promotional grup item(s) and quantity qualify for the incentive. See *Work with Promotional Pricing Groups (WPRG)*. The Qty required and Required group fields are required with this setting. *Item* = Orders that include the required item and quantity qualify for the incentive. The Required item and Qty required fields are required with this setting. *Order/Dollar* =Orders that meet the required dollar amount qualify for the incentive. The Dollars required field is required with this setting. Required.
Dollars required	If you entered *O* for an order/dollar promotion, enter the merchandise total that the customer must order to be eligible for an incentive. Numeric, 13 positions with a 2-place decimal; required if you entered O in the Type of promotion field.
Required item	If you entered *I* for an item promotion, enter the item that the customer must order to be eligible for an incentive. Alphanumeric, 12 positions; required if you entered *I* in the Type of promotion field.
Qty required	If you entered *I* or *G* for an item or group promotion, enter the order quantity (from the required item or items within the required group) that the customer must order to be eligible for an incentive item or incentive group. Numeric, 5 positions; required if you entered *I* or *G* in the Type of promotion field.

Field	Description
Required group	Enter the code for the promotional group from which the customer must order to be eligible for an incentive item. Numeric, 3 positions; required if you entered *G* in the Type of promotion field.
Combination flag	If you entered a *G* in the Type of promotion field, enter the code that indicates if a combination of items is required for a customer to be eligible for the incentive. Valid values are: 1. *Combination required* 2. blank = combination not required If you select *Combination required*, the customer must order each item in the promotion group (up to the specified required quantity) to be eligible for an incentive. For example, if you set up a promotion group with three items (item 1, item 2, and item 3) and the required order quantity is three, then the customer must order 1 of each item. If the required order quantity is 2, then only 2 of the three items are required, but they must be different items. If you leave this field blank, the order will become eligible for incentives as soon as any item in the promotion group is ordered with the required order quantity. Optional.
Type of incentive	Defines whether a specific item or a group of items will be used as an incentive. Valid values are: *Group* = You must define an incentive group; the item(s) associated with it will appear at the *Select Incentive Group Window* in order entry. *Item* = You must define an incentive item must be defined; it will appear at the *Select Incentive Item Screen* in order entry. Required.
Incentive item	The incentive item. Item codes are defined in and validated against the Item table. Alphanumeric, 12 positions; required if you entered an *I* in the Type of incentive field.
Clr/Size/Wdth	The incentive item's unique characteristics, such as its color and size. If the incentive item has SKUs but you do not specify a SKU here, the customer will be able select a SKU in order entry. Alphanumeric, three 4-position fields; optional.

Field	Description
Qty limit	The maximum order quantity allowed for an incentive item or item(s) from an incentive group. **Note:** Although the system does not allow you to exceed this quantity at the *Select Incentive Item Screen*, the *Select Incentive Group Window*, or the *SKU Scan Screen*, it is still possible to change the order line to a higher quantity afterward, for example at the *Work with Order Lines Screen (Adding Items to the Order)* or in order maintenance. Numeric, 5 positions; required.
Incentive group	Enter the code for the promotional pricing group. Promotional pricing groups are defined using *Work with Promotional Pricing Groups (WPRG)*. Numeric, 3 positions; required if you entered a G in the Type of incentive field.
You can enter either an Incentive price, Incentive Discount %, Incentive Discount $, or select the No charge flag to indicate the type of incentive you are offering with the promotional pricing.	
Incentive price	The set unit price to charge for an incentive item or item(s) from an incentive group. If you specify an incentive price, you must leave the No charge flag, the Incentive discount %, and the Incentive discount $ fields blank. Numeric, 13 positions with a 2-place decimal; optional.
No charge	Indicates whether to charge for an incentive item or item(s) from an incentive group. Valid values are: *selected* = No Charge *unselected* = priced If you want to offer this item at no charge, select *No Charge*. If you select the No charge flag, you must leave the Incentive price, the Incentive discount %, and the Incentive discount $ fields blank.

Field	Description
Incentive tax price	The unit price to charge for the incentive item if it is subject to VAT. Displayed only if the *Tax Included in Price (E70)* system control value is *selected*. Numeric, 13 positions with a 2-place decimal; optional.
Incentive disc %	The discount percentage to subtract from the selling price of an incentive item. If you specify an Incentive discount percent, you must leave the No charge flag, Incentive price, and Incentive discount $ fields blank. Numeric, 5 positions with a 2-place decimal; optional.
Incentive disc $	The dollar discount to subtract from the unit selling price of an incentive item. If you specify an Incentive discount dollar amount, you must leave the No charge flag, Incentive price, and Incentive discount % fields blank. Numeric, 13 positions with a 2-place decimal; optional.

Screen Option	Procedure
Review the items within a promotional group (defined in the Required group field)	Select *Required Grp Dtl* to advance to the *Work with Promotion Group Details Screen*. You cannot change anything on this screen. You need to have set up a promotional group using Work with Promotional Groups in order for details to display.
Review the items in an incentive group (defined in the Incentive group field)	Select *Incentive Grp Dtl* to advance to the *Work with Promotion Group Details Screen*. You cannot change anything on this screen. You must have set up an incentive group using Work with Promotional Groups in order for details to display.

Working with Price Codes (WPCD)

Price codes allow you to define a price discount for items/SKUs in a specified offer or source code when you order a specified quantity. The price code can offer a dollar or percentage off the price of the item, a special price for the item, or a group price for a defined group of items. The system applies price code pricing to an order during repricing and end-of-order pricing.

Assigning items to price codes: Use *Assigning Price Codes (APCD)* to assign items to price codes.

Reviewing price code assignments: Use *Display Price Code Assignments (DPCA)* to review the items/SKUs assigned to a price code by either offer or source code and the requirements that must be met for an order to be eligible for the price code.

Promotions: You can also use price codes as qualifiers for promotions; see *Working with Promotions (WPRO)* for background.

Types of Price Code Discounting

You can offer the following types of price code discounts:

- *Price Code Special Price*
- *Price Code Dollar Discount*
- *Price Code Percent Discount*
- *Price Code Group Price*

Price Code Special Price

This discount provides a special price when you order the required quantity of the items/SKUs defined for the price code.

Example: Regular item price is $24.00, but order two or more of the qualifying items and pay $20.00 for each item. See *Example: Price Code Special Price Discount* for a detailed example.

Price Code Dollar Discount

This discount provides a dollar amount to subtract from the regular item price when you order the required quantity of the items/SKUs defined for the price code.

Example: Order two or more of the qualifying items and receive $2.00 off each item price. See *Example: Price Code Dollar Off Discount* for a detailed example.

Price Code Percent Discount

This discount provides a percentage to subtract from the regular item price when you order the required quantity of the items/SKUs defined for the price code.

Example: Order two or more of the qualifying items and receive 5% off each item price. See *Example: Price Code Percent Off Discount* for a detailed example.

Price Code Group Price

Example: Buy a shirt and tie and pay $50.00 total. See *Example: Price Code Group Price Discount* for a detailed example.

Prorating the group price: The system applies the group price discount to each order line on a pro-rata basis.

```
extended amount of the detail line before applying discounts / discountable
order merchandise total = discount percentage
```

```
pre-discount unit price of the detail line - [(total discount amounts to prorate
* discount percentage from above calculation) / line unit quantity] = unit
selling price
```

Example: An order contains the following order lines:

Line#	Quantity	Price	Extended Price
1	1	15.00	15.00
2	1	25.00	25.00

Order lines 1 and 2 qualify for price code 505: $30.00 total for 2.

The merchandise total for the lines before the group price discount is *$40.00* (15.00 + 25.00), meaning the group price discount results in *$10.00* off the merchandise total.

The system calculates the discount percentage for order line 1: *15.00* `order line extended price` / *40.00* `discountable order merchandise total` = *.375*

The system calculates the unit selling price for order line 1: *15.00* `pre-discount unit price` - *[(10.00* `total discount amount to prorate` * *.375* `discount percentage from above calculation`*)* / *1* `line unit quantity`*]* = *11.25* `unit selling price`

The system calculates the discount percentage for order line 2: *25.00* `order line extended price` / *40.00* `discountable order merchandise total` = *.625*

The system calculates the unit selling price for order line 2: *25.00* `pre-discount unit price` - *[(10.00* `total discount amount to prorate` * *.625* `discount percentage from above calculation`*)* / *1* `line unit quantity`*]* = *18.75* `unit selling price`

Line#	Quantity	Discounted Price	Extended Price
1	1	11.25	11.25
2	1	18.75	18.75

Allow Multiples?

The Allow Multiples setting defines how an order can qualify for a price code discount multiple times.

- *Unselected* = Once an order qualifies for the price code based on the price code quantity requirement, the system applies the price code discount to all qualifying items on the order that are not already assigned to a price code.
- *Selected* = Once an order qualifies for the price code based on the price code quantity requirement, the remaining items on the order that are not already assigned to a price code must meet the price code quantity requirement again in order to qualify for the price code. The Distinct By setting defines how the system determines whether the order meets the price code multiple requirement.

Distinct By:

- *Blank* = The order must meet the price code quantity requirement again in order to qualify. *Example:* If the Quantity required is 3, the order must contain 3 items/ SKUs defined for the price code in order to qualify. If the order contains 7 items that qualify, the system applies the price code to 6 of the items.
- *Item* = The quantity requirement for the price code requires separate *items* assigned to the price code in order to qualify. *Example:* If the Quantity required is 3, the order must contain 3 separate items defined for the price code in order to qualify.
- *SKU* = The quantity requirement for the price code requires separate *SKUs* assigned to the price code in order to qualify. *Example:* If the Quantity required is 3, the order must contain 3 separate SKUs defined for the price code in order to qualify.
- *Category* = The quantity requirement for the price code requires separate *item categories* for the items assigned to the price code in order to qualify. *Example:* If

the Quantity required is 3, the order must contain 3 separate item categories for the items defined for the price code in order to qualify.

In this topic:

- *Price Code Setup*
- *Regular Price Code Pricing*
- *Examples*
  - *Example: Price Code Special Price Discount*
  - *Example: Price Code Dollar Off Discount*
  - *Example: Price Code Percent Off Discount*
  - *Example: Price Code Group Price Discount*
  - *Example: Applying Multiple Price Codes to the Order*
  - *Example: Item Qualifies for More than One Price Code*
  - *Example: Price Code Multiples and Distinct By*
- *Work with Price Codes Screen*
- *Create Price Code Screen*
- *Work with Qualifying Customer/Price Groups Screen*

Price Code Setup

Before you can use the price code pricing method, you must:

1. Create a price code.
2. Define the sold to customers and customer price groups that qualify for the price code. If you do not define any sold to customers or customer price groups, then ALL sold to customers and customer price groups qualify for the price code.
3. Assign items, by either offer or source code, to the price code. See *Assigning Price Codes (APCD)* for more information.
4. Select the *Price Codes (D93)* system control value to perform price code pricing during repricing and end-of-order pricing.
5. If the *Customer Price Group Code for CPG Pricing Only (L58)* system control value is blank, the system performs .
6. If the *Customer Price Group Code for CPG Pricing Only (L58)* system control value contains a customer price group, the system performs *Customer Price Group Price Code Pricing*.

Price Code upload: The *Price Code Upload Table (PriceCdUpload)* allows you to upload price code information from an external system. Use the *Upload* option on the *Work with Price Codes Screen* to perform the *Price Code Upload Process*. This process creates, updates, and deletes records in the Price Code, Price Code Customer, and Price Code Details tables. See *Price Code Upload* for more information.

To manually set up price code information:

#	Step
1.	Use the *Create Price Code Screen* to create a price code. 1. *Special Price*: Enter the discounted price in the *Special price* field. If the *Tax Included in Price (E70)* system control value is *selected*, define the discounted price for orders subject to VAT in the *Tax inclusive price for special price* field. 2. *Dollar Off:* Enter the dollar off the item price in the *Dollar discount* field. 3. *Percentage Off:* Enter the percentage off the item price in the *Percent discount* field. 4. *Group Price:* Enter the discounted price for the group of items in the *Group price* field and select the *Allow Multiples* flag. Use the *Distinct By* field to define how the system determines whether the order meets the multiple requirement. If the *Tax Included in Price (E70)* system control value is *selected*, define the discounted price for orders subject to VAT in the *Tax inclusive price for group price* field.
2.	Use the *Work with Qualifying Customer/Price Groups Screen* to define the sold to customers and customer price groups that qualify for the price code. **Note:** If you do not define any sold to customers or customer price groups for a price code, then ALL sold to customers and customer price groups qualify for the price code.

#	Step
3.	Use the *Work with Price Codes for Offer Screen* to assign items, by either offer or source code, to the price code. You can assign more than one price code to each item/offer or item/source combination. If more than one price code applies to an order, the system: 1. If you use *Regular Price Code Pricing*, uses the price code with the lowest sequence number. If two price codes have the same sequence number, the system applies the price code with the lowest numeric price code. If order lines remain on the order that are not assigned a price code, the system applies the price code with the next lowest numeric price code, until all of the eligible lines on the order are assigned to a price code. 2. If you use *Customer Price Group Price Code Pricing*, uses the price code that provides the greatest discount to the order. If eligible lines remain on the order that are not assigned a price code, the system applies the price code that provides the next greatest discount to the order, until all of the eligible lines on the order are assigned to a price code. **Note:** Regardless of the sequence number and price code number, price code assignments by source code take precedence over price code assignments by offer. For example, if the items on an order are assigned to price code 10 with a sequence number of 20 by source code, and also assigned to price code 2 with a sequence number of 1 by offer, price code 10 overrides price code 2.

Assigning Price Codes (APCD)

Purpose: Use the Assign Price Codes function to assign price breaks (defined with *Working with Price Codes (WPCD)*) to items by source code or offer.

You can assign one or more price codes to each item/source code and item/offer combination, and you can assign the same price codes to a group of items. Typically, you might assign the same price code or sequence of price codes to items that appear together in a catalog. In Order Entry, the system reprices items eligible for price codes repricing when you select *Reprice* at the Order Detail screen.

Reviewing price code assignments: Use *Display Price Code Assignments (DPCA)* to review the items/SKUs assigned to a price code by either offer or source code and the requirements that must be met for an order to be eligible for the price code.

In this topic:

- *Assign Price Codes Screen*
- *Work with Price Codes for Offer Screen*
- *Changing Price Code Assignments*

Assign Price Codes Screen

Purpose: Use this screen to assign a price code to an item by offer or source code.

How to display this screen: Enter *APCD* in the Fast path field at the top of any menu or select Assign Price Codes from a menu.

Field	Description
Item	A code representing a unit of inventory that you sell. Item codes are defined in and validated against the Item table. Alphanumeric, 12 positions; required.
SKU (Unlabeled field(s) to the right of the item field)	The item's unique characteristics, such as its color or size. Alphanumeric, three 4-position fields; optional.
Offer	A catalog, advertisement, or other means you use to present merchandise to your customers. The price code defined for an item/offer combination applies to orders whose header-level source code points to the offer. Offers are defined in and validated against the Offer table. See *Working with Offers (WOFR)*. Alphanumeric, 3 positions; required if you do not enter a source code.
Source	A code you use to group a segment of your customers. The price code defined for this item/source code combination applies to orders with this source code on the order header. Source codes are defined in and validated against the Source Code table. See *Working with Source Codes (WSRC)*. Alphanumeric, 9 positions; required if you do not enter an offer

> **Note:**
>
> You have the option of assigning a price code to an item by either offer or source code. If you assign price codes to an item by both methods, the price codes assigned by source code take precedence.

To enter an item and offer or source code to be assigned price codes, complete the Item field, the SKU information if desired, and either the Offer or Source code field.

You advance to the *Work with Price Codes for Offer Screen* if you entered an offer code, or the Work with Price Codes for Source if you entered a source code.

Work with Price Codes for Offer Screen

Purpose: You can work with price codes for offer or source in either Add mode or Change mode. When you advance to this screen to first assign price codes to an item, it is in Add mode; see *Changing Price Code Assignments* for a discussion of Change mode.

How to display this screen: You advance to either the Work with Price Codes for Offer or Work with Price Codes for Source screen when you select *OK* at the *Assign Price Codes Screen*. You can also switch to Add Mode from Change mode on either screen by selecting *Add Price Codes*.

Price code: Enter as many price codes as apply to this item/offer or item/source combination. The price code is a three-position, numeric field. The system validates your entries against the Price Code table.

See *Assign Price Codes Screen* for the remaining fields on this screen.

Screen Option	Procedure
Change existing price codes	Select *Change* to switch to Change mode. See *Changing Price Code Assignments*.

Changing Price Code Assignments

Purpose: Use the Work with Price Codes for Source screen or this screen in Change mode to review or delete price codes that have been assigned to an item/offer or item/source combination. The *Work with Price Codes for Offer Screen* in Change mode is identical, except that the source code displays instead of the offer. Each field on this screen is described under *Assign Price Codes Screen* or *Work with Price Codes for Offer Screen*.

How to display this screen: You advance to these screens from the *Assign Price Codes Screen* when you enter an item/offer or item/source combination that already has price codes assigned to it, or from the Work with Price Codes for Offer or *Work with Price Codes for Offer Screen* in Add mode when

- you enter one or more price codes, or
- select *Change*.

To delete: Select *Delete* for a price code to delete it.

> **Note:**
>
> No message displays when you select *Delete*; the system simply removes the price code.

Display Price Code Assignments (DPCA)

Price codes allow you to define a price discount for items/SKUs in a specified offer or source code when you order a specified quantity. The price code can offer a dollar or percentage off the price of the item, a special price for the item, or a group price for a defined group of items. The system applies price code pricing to an order during repricing and end-of-order pricing.

1. Use *Working with Price Codes (WPCD)* to create a price code and to define the requirements that must be met for an item to be eligible for the price code. In addition, the *Price Code Upload Table (PriceCdUpload)* allows you to upload price code information from an external system. Use the *Upload* option on the *Work with Price Codes Screen* to perform the *Price Code Upload Process*. This process creates, updates, and deletes records in the Price Code, Price Code Customer, and Price Code Details tables. See *Price Code Upload* for more information.
2. Use *Assigning Price Codes (APCD)* to assign items/SKUs to a price code by offer or source code.
3. Use Display Price Code Assignments (DPCA) to review the items/SKUs assigned to a price code by offer or source code and the requirements that must be met for an order to be eligible for the price code. **Note:** You must use the *Work with Qualifying Customer/ Price Groups Screen* in *Working with Price Codes (WPCD)* to review the customer price groups and sold to customers that qualify for the price code discount.

For more information: See:

- *Types of Price Code Discounting* for an overview on the types of price code discounting you can offer.
- *Price Code Setup* for more information on how to set up a price code pricing method.
- *Regular Price Code Pricing* for an overview of price code pricing when the *Price Codes (D93)* system control value is selected.
- *Customer Price Group Price Code Pricing* for an overview on price code pricing when the *Customer Price Group Code for CPG Pricing Only (L58)* system control value contains a customer price group code.

Price Code Assignments

Display Price Code Assignments Screen

Purpose: Use this screen to review the items/SKUs assigned to a price code by either offer or source code and the requirements that must be met for an order to be eligible for the price code.

How to display this screen: Enter *DPCA* in the Fast path field at the top of any menu or select Display Price Code Assignment from a menu.

Column sort: You can sort on any column on this screen by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Price codes first display on this screen in ascending alphanumeric price code, item/SKU sequence.

Field	Description
Price Code	The price code that defines a repricing method you offer to your customers when they order a sufficient quantity of items associated with this price code. Price codes are defined in and validated against the Price Code table. **Search:** Enter a valid price code to display price codes that starts with your entry. Numeric, 7 positions; optional.
Description	A description of the price code. Alphanumeric, 30 positions; display-only.
Item	A code representing an item assigned to the price code. Item codes are defined in and validated against the Item table. **Search:** Enter a valid item code to display price codes that match your entry. Alphanumeric, 12 positions; optional.
SKU	The SKU of an item assigned to the price code. SKU codes are defined in and validated against the SKU table. **Search:** Enter a valid SKU code to display price codes that contains your entry. Alphanumeric, 14 positions; optional.

Field	Description
Offer	An offer code assigned to the price code. The price code defined for an item/offer combination applies to orders whose header-level source code points to the offer. Offers are defined in and validated against the Offer table. See *Working with Offers (WOFR)*. **Search:** Enter a valid offer code to display price codes that match your entry. Alphanumeric, 3 positions; optional.
Source	A source code assigned to the price code. The price code defined for an item/source code combination applies to orders with this source code on the order header. Source codes are defined in and validated against the Source Code table. See *Working with Source Codes (WSRC)*. **Search:** Enter a valid source code to display price codes that match your entry. Alphanumeric, 9 positions; optional.

Screen Option	Procedure
Review the details of a price code	In the Action field, select *Display* for a price code assignment to advance to the *Display Price Code Window*.
Review the qualifying customers and/or price groups for a price code	In the Action field, select *Qual CPG* to advance to the *Display Qualifying Customer/Price Groups Screen*.

Display Price Code Window

Purpose: Use this window to review the details of a price code.

How to display this screen: Select *Display* for a price code assignment on the *Display Price Code Assignments Screen*.

Field	Description
Price Code	The price code that defines a repricing method you offer to your customers when they order a sufficient quantity of items associated with this price code. Price codes are defined in and validated against the Price Code table. Numeric, 7 positions; display-only.
Description	The description of the price code. Alphanumeric, 30 positions; display-only.
Start Date	The beginning date when the price code discount becomes effective. Numeric, 6 positions (in user date format); display-only.
End Date	The end date when the pice code discount becomes effective. Numeric, 6 positions (in user date format); display-only.

Field	Description
Qty Required	The total quantity the customer must order of all qualifying items to get the price break. **Note:** The system evaluates minimum price code quantity by ship-to address. Numeric, 7 positions; display-only.
Distinct By	The method the system uses to determine whether the customer ordered the quantity required to receive the group price. Valid values: • *Item* = The quantity required is by item. • *SKU* = The quantity required is by SKU. • *Category* = The quantity required is by item category. Display-only.
Special Price	The special price to charge the customer for all qualifying items associated with the price code. Numeric, 13 positions with a 2-place decimal; display-only.
Tax Inclusive (Special) Price	The special price to charge the customer for all qualifying items associated with the price code on orders subject to VAT. This field displays only if the Tax Included in Price (E70) system control value is *selected*. **Note:** If an order is subject to VAT, but the item is subject to a price code with a only a special price and not a Tax-inclusive price, the system uses the special price for the price code. Numeric, 13 positions with a 2-place decimal; display-only.
Dollar Discount	The dollar amount to subtract from the regular price of each qualifying item associated with the price code. In the *Tax Included in Price (E70)* system control value is *selected*, the system applies the discount against the regular tax-inclusive price to calculate the tax-inclusive price code price. Numeric, 13 positions with a 2-place decimal; display-only.
Percent Discount	The percentage of the regular item price to subtract for each qualifying item associated with the price code. If the *Tax Included in Price (E70)* system control value is *selected*, the system applies the discount against the regular tax-inclusive price to calculate the tax-inclusive price code price. Numeric, 5 positions with a 2-place decimal; display-only.

Field	Description
Group Price	The group price to charge the customer for all qualifying items associated with the price code. Numeric, 13 positions with a 2-place decimal; display-only.
Tax Inclusive (Group) Price	The group price to charge the customer for all qualifying items associated with the price code on orders subject to VAT. This field displays only if the *Tax Included in Price (E70)* system control value is *selected*. **Note:** If an order is subject to VAT, but the item is subject to a price code with a only a special price and not a Tax-inclusive price, the system uses the special price for the price code. Numeric, 13 positions with a 2-place decimal; display-only.
Allow Multiples	Defines whether the order qualifies for a discount multiple times if the correct number of qualifying items/SKUs is added to the order. • *Selected* = Allow multiples. • *Unselected* = Do not allow multiples. Display-only.
Sequence	The order in which the system evaluates whether a price code applies to an order. *Regular Price Code Pricing*: If an order qualifies for two or more price codes, the system uses the price code with the lowest sequence number. If two price codes have the same sequence number, the system uses the price code with the lowest price code number. *Customer Price Group Price Code Pricing*: If an order qualifies for two or more price codes, the system uses the price code that provides the greatest discount to the order. If two price codes provide the same discount, the system uses the price code with the lowest sequence number. If two price codes have the same sequence number, the system uses the price code with the lowest price code number. Numeric, 7 positions; display-only.

Display Qualifying Customer/Price Groups Screen

Purpose: Use this screen to review the customers and/or price groups that qualify for the price code.

How to display this screen: Select *Qual CPG* for a price code assignment at the *Display Price Code Assignments Screen*.

Column sort: You can sort on any column on this screen by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Qualifying customers and customer price groups first display on this screen in ascending sold to customer number, then ascending customer price group code sequence.

Field	Description
Price Code	The price code that defines a repricing method you offer to your customers when they order a sufficient quantity of items associated with this price code. Price codes are defined in and validated against the Price Code table. Numeric, 7 positions; display-only.
Description unlabeled field to the right of Price Code	A description of the price code. Alphanumeric, 30 positions; display-only.
Group	The code for the customer price group that qualifies for the price code. Customer price groups are defined in and validated against the Customer Price Group table. *Search:* Enter a full or partial customer price group code to display customer price groups that begin with your entry. Alphanumeric, 4 positions; display-only.
Customer	The sold to customer number of a customer that qualifies for the price code. Sold to customers are defined in and validated against the Customer Sold To table. *Search:* Enter a full or partial sold to customer number to display sold to customers that begin with your entry. Numeric, 9 positions; display-only.

Working with Price Tables (WPTB)

Purpose: Use the Work with Price Tables function to define a pricing structure based on unit quantity or total dollars ordered. You can create price breaks for individual items on an order, or for the total order of a group of items. You can also select items to offer as free or reduced-price premiums on qualifying orders.

Unlike other pricing methods, price tables control pricing in both Order Entry and Order Maintenance (other methods apply in Order Entry only). No repricing takes place, however, once you have printed a pick slip for any items on the order.

You can build a table to price most or all of the items and groups of items that you normally offer. By keeping the bulk of your pricing information in the price table, you can reduce the amount of effort required to maintain pricing information.

In this topic:

- *Copy Price Table Window*
- *First Work with Price Table Item Screen*
- *Create Price Table Item Screen*
- *Second Work with Price Table Item Screen*
  - *Quantity Pricing Level Information by Item*
  - *Dollar Pricing Level Information by Item*
- *Copy Price Table Item Window*
- *First Work with Price Table Group Screen*
- *Create Price Table Group Screen*
- *Second Work with Price Table Group Screen*
  - *Quantity Pricing Level Information by Group*
  - *Dollar Pricing Level Information by Group*
- *Third Work with Price Table Group Screen*
- *Copy Price Table Group Window*

Examples of Price Table Pricing

Purpose: Price tables provide considerable flexibility in creating pricing structures for your company. The following examples illustrate some of the ways you can use this function.

Example One: Group Quantity Pricing

You sell several similar items on the same page in your catalog. Each item is offered at the same price breaks; the customer qualifies for the price breaks by ordering any combination of these items. Additionally, you plan to offer these items at the same price breaks in several catalogs. Rather than defining price breaks individually for each item/offer combination, you can create a group within a price table to define the price breaks, then assign each item to that price table and group. The price table will always provide the same pricing information for each item within the group.

For example, your items are:

- AA100
- AB200
- AC300
- AD400
- AE500

The price breaks for this group of items are:

Quantity	Price Per Unit
1	$12.99
2-5	$11.99
6-11	$10.99
12+	$9.99

A customer places an order for:

Item	Quantity
AA100	1
AB200	4
AC300	5

The total unit quantity ordered for this group is 10, which falls within the 6-11 range. The customer pays $10.99 per item.

Example Two: Group Quantity with Separate Item Pricing

This example is similar to example one, in that the total unit quantity for the group determines the price break. In this example, however, you can define a separate pricing structure for each item within the group.

For example, page 10 of your catalog includes the following items, and their associated price breaks:

Item	Price for 1-5	Price for 6-11	Price for 12-24	Price for 25+
BA100	$55.99	$53.99	$51.99	$49.99
BB200	$53.99	$51.99	$49.99	$47.99
BC300	$27.99	$25.99	$23.99	$21.99
BD400	$42.99	$39.99	$36.99	$34.99

The customer earns the quantity price break for any combination of these items. For example, an order contains:

Item	Quantity
BA100	2
BB200	2
BC300	2

The total quantity for the group is 6. The customer pays for each item:

Item	Quantity
BA100	$53.99 each
BB200	$51.99 each
BC300	$25.99 each

You can mix and match the pricing structures presented in examples one and two. For example, you can create a group in which some of the items take their prices from the group level (as in example one), while other items have unique pricing (as in example two); yet each item earns its price breaks based on the entire group quantity.

Example Three: Discount by Group Dollars

In this example, you base a discount percentage on the total dollar amount of the group on the order rather than the unit quantity. A pricing structure like this may work best when you sell a group of items with a broad range of prices together.

Your group includes the following items:

Item	Price
CA100	$50.00
CB200	$25.00
CC300	$125.00
CD400	$5.00

You offer a discount based on group dollars as follows:

Total Group Dollars	Discount Percentage
$125-$249	20%
$250-$449	25%
$450-$649	35%
$650-$999	40%
$1000+	50%

If the customer's total order from this group comes to less than $125, you charge the full item price. If the customer's total order from the group comes to $125 or more, however, you subtract the percentage indicated from each item on the order. In the case of CD400, the item unit price would be $4.00 ($5.00 - 20%).

Premiums: You can define a premium item to offer based on item quantity or dollars, group quantity or dollars, or both. A premium can be either a free gift or an item you offer at a reduced price. The system offers the premium item in order entry only if the price of the ordered item is derived from the price table.

Maximum levels for items: You can specify a maximum price level to use for an item, yet define price breaks that exceed that maximum. A maximum price level might be useful if you want to give your Order Entry operators the discretion to exceed that maximum when they feel it is appropriate. For example, you can define a maximum price level for item DD500 as $5.00 apiece for a quantity of 500. If a customer orders 10,000, the Order Entry operator can override the maximum price break and offer the item at $3.50 apiece.

Overriding the maximum: You can use the *Price Table Level Override Code (E05)* to apply the best possible price table pricing to an order line, even if it is beyond the maximum specified in the price table; however, to apply this pricing, you need to:

1. Enter the requested quantity of the item at the *Work with Order Lines Screen (Adding Items to the Order)*using the default pricing
2. Select *Change* for the item to advance to the *Work with Order Line Screen (Changing/ Adding an Item)*
3. Complete this screen by entering the *Price Table Level Override Code (E05)*, but no price for the item

When you select *Reprice* or *Accept*, the system applies the best possible price table pricing.

You can also override the maximum through the order API by passing the *Price Table Level Override Code (E05)* but no price override amount in the *Inbound Order XML Message (CWORDERIN)*.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

> **Note:**
>
> You cannot use the *Price Table Level Override Code (E05)* as a regular price override reason code when you manually enter a price override.

Order Entry and Order Maintenance: When you add each item to an order in Order Entry or Order Maintenance, the price that appears may not indicate the final price break. This is because the system cannot know each price break that may apply to the items until you are through entering them.

Depending on your normal procedure in Order Entry, final price breaks will apply after you select *Accept Order* or *Add Recip*; or, you can display repriced lines by selecting *Reprice*. If the order is eligible for a premium item, the system advances you to the *Display Premiums Screen (Price Table Premiums)* during repricing, initial order accept, and the final order accept. At this screen, you can elect to add the premium item to the order, or delete it if desired. If you select to add the premium item to the order, the system immediately adds the premium item to the order.

To get an accurate picture of pricing and premiums for on order, you should select *Properties* when you add *or* remove items from the order. Additionally, you should reprice in Order Maintenance by selecting *Properties* before you accept the order by selecting *Accept*, to make sure that you have an opportunity to adjust premiums or review pricing with the customer if needed.

> **Note:**
>
> The system does not include items added at no charge as part of a BOGO promotion when determining price table pricing. See *Working with Promotions (WPRO)* for more information.

How the System Selects a Price Table Price for an Item

There are two places on the system where you can define a price table that may apply to an order:

- in the *Price table* field in the Source Code table
- in the *Default Price Table (E04)* system control value.

The table below indicates how the system searches for an item price in different scenarios.

In the situations of:	When you enter the item on the order, the system:	When you accept the order or select Properties, the system:
A *Default Price Table (E04)* is defined in the System Control table and a different price table is defined for the source code	Assigns a price from the source code table if it exists; otherwise, goes through the regular pricing routine for the item	Reprices based on the source code price table, or the default price table if the item record exists there and not in the source code table; otherwise, does not reprice based on price table
A *Default Price Table (E04)* is defined in the System Control table and no price table is defined for the source code	Assigns a price from the default table if you have defined pricing at the item rather than the group level; otherwise, goes through the regular pricing routine for the item	Reprices based on the default price table if the item record exists there; otherwise, does not reprice based on price table
A price table is defined for the source code but no *Default Price Table (E04)* is defined in the System Control table	Assigns a price from the source code table if it exists; otherwise, goes through the regular pricing routine for the item	Reprices based on the source code price table if the item record exists there; otherwise, does not reprice based on price table

Setting up price tables: You might follow the steps below to set up price tables on your system:

1. Create the price table (code and description).
2. Create each price table group within the price table.
3. Create each price table item, and associate each item with a group as desired (you must have first created the price table groups).
4. Create a price override reason code (see *Establishing Price Override Reason Codes (WPOR)*) for exceeding the maximum price break for an item.
5. Specify the *Price table* for each desired source code (the pricing method for the source code should be set to *Reg Plus Reprice*).
6. Specify the system control values related to price tables, described below.

Related system control values: The following system control values affect how the system uses price table information in your company:

- *Default Price Table (E04)*: the price table to use if the Price table field for the Source code is blank, or if the item is not found in the price table defined for the Source code.
- *Price Table Level Override Code (E05)*: the Price Override Reason to use when you give a customer a price break that exceeds the maximum specified for the item in the price table.
- Price Method Sequence/Price Table: the order in which to apply price table pricing relative to other pricing options.
- End of Order Pricing -- Use Price Table Pricing? indicates whether to check a price table for pricing information in Order Entry or Order Maintenance.

For more information:

- system control values: *Setting Up Order Entry Values*
- price table repricing and adding premiums: *Entering Orders*

- establishing price override reason codes: *Establishing Price Override Reason Codes (WPOR)*
- repricing and adding premiums in Order Maintenance: *Changing Item Detail Line Information in Order Maintenance*
- specifying a price table for a source code: *Working with Source Codes (WSRC)*

Work with Price Table Screen

Use this screen to review and work with existing price tables in your company, or to advance to the *Create Price Table Screen*.

How to display this screen: Enter *WPTB* in the Fast path field at the top of any menu, or select Work with Price Tables from a menu.

Field	Description
Table	A code representing a price table. A price table can include one or many item groups and many individual items; you use it to define how you will reprice items based on the customer's total order. Alphanumeric, 5 positions; optional.
Description	The description associated with the price table. Alphanumeric, 30 positions; optional.

Screen Option	Procedure
Create a new price table	Select *Create* to advance to the *Create Price Table Screen*.
Change a price table	Select *Change* for a table to advance to the Change Price Table screen. At this screen, you can change only the description. See *Create Price Table Screen* for field descriptions.
Copy a price table	Select *Copy* for a table to advance to the *Copy Price Table Window*.
Delete a price table	Select *Delete* for a table. If price table details exist, the Confirm Delete pop-up window indicates that dependent records exist and requires you to confirm or cancel.
Display a price table	Select *Display* for a table to advance to the Display Price Table screen. This screen displays only the price table code and description. See Create Price Table Screen for details.
Work with price table items	Select *Work w/Items* for a table to advance to the *First Work with Price Table Item Screen*.
Work with price table groups	Select *Work w/Groups* for a table to advance to the *First Work with Price Table Group Screen*.

Create Price Table Screen

Purpose: Use this screen to add a new price table to your company. You must create the price table here before you define the pricing structure for items and groups.

How to display this screen: Select *Create* at the *Work with Price Table Screen*.

Field	Description
Price table	A code representing a price table you are building to control price breaks for items and groups of items. Alphanumeric, 5 positions. Create screen: required. Change screen: display-only.
Description	The description of the price table. Alphanumeric, 30 positions; required.

Copy Price Table Window

To copy: Select *Copy* for a price table at the *Work with Price Table Screen* to copy all pricing detail to a new price table.

Enter the code and description of the new price table in the To price table and To description fields. See *Create Price Table Screen* for details.

If you enter the code of an existing price table, the system displays a message such as the following:

Price Table 123 Already Exists.

In order to copy all price table information to the destination table, you need to delete the table first and then copy.

First Work with Price Table Item Screen

Purpose: Use this screen to work with each item that takes its pricing from the price table.

How to display this screen: Select *Work w/Items* for a price table at the *Work with Price Table Screen*.

Field	Description
Item	A code representing a unit of inventory that you price with this price table. Item codes are defined in and validated against the Item table. Alphanumeric, 12 positions; optional.
SKU	Codes representing the item's unique characteristics, such as its color or size. Alphanumeric, three 4-position fields; optional.
Group	This code represents the price table group that the item belongs to. Alphanumeric, 5 positions; optional.

Screen Option	Procedure
Assign a new item to the price table	Select *Create* to advance to the *Create Price Table Item Screen*.
Change price table item information	Select *Change* for an item to advance to the *Second Work with Price Table Item Screen*.
Copy price table item information	Select *Copy* for an item to advance to the *Copy Price Table Item Window*.

Screen Option	Procedure
Delete price table item information	Select *Delete* for an item to delete it from the price table.
Display price table item information	Select *Display* for an item to advance to the *Second Work with Price Table Item Screen*; each field will be display-only.

Create Price Table Item Screen

Purpose: Use this screen to specify the item/SKU to include in a price table before you specify the pricing details for the item.

> **Note:**
>
> If you are going to define a pricing structure for the item based on the total dollars or quantity ordered from a group, you need to define the group before entering all pricing details for the item. See *First Work with Price Table Group Screen*.

How to display this screen: Select *Create* at the *First Work with Price Table Item Screen*.

Field	Description
Item	A code representing a unit of inventory that you price with this price table. Item codes are defined in and validated against the Item table. Alphanumeric, 12 positions; required
SKU Code	Codes representing the item's unique characteristics, such as its color or size. To set up price table pricing for: 1. All SKUs of a SKUed item: Enter the base item code only. 2. Individual overrides for selected SKUs of a SKUed item: Create price table pricing for individual SKUs in addition to the base item pricing; the individual records act as overrides for these SKUs only. 3. Selected SKUs of a SKUed item: Create price table pricing for the selected SKUs only. Alphanumeric, three 4-position fields; optional.

Completing this screen:

1. Complete the Item field and, optionally, the SKU field(s).
2. You advance to the *Second Work with Price Table Item Screen*.

> **Note:**
>
> If you exit the *Second Work with Price Table Item Screen* without entering pricing information for the item, you return to the *First Work with Price Table Item Screen*. Your cursor will be positioned at the item code you have just entered. You can select *Change* for the item to return to the *Second Work with Price Table Item Screen* and complete the pricing information, or you can delete the item from the price table by selecting *Delete* for the item.

Second Work with Price Table Item Screen

Purpose: Use this screen to define the price structure and premiums for an item.

How to display this screen: Complete the *Create Price Table Item Screen* or select *Change* for an item at the *First Work with Price Table Item Screen*.

> **Note:**
>
> The detail lines at the bottom of the screen display differently depending on whether the pricing type is based on quantity or dollars. The screen below displays the quantity pricing format; the dollars format is presented in Dollar Pricing Level Information by Group.

Field	Description
Price table	The price table containing the item. Alphanumeric, 5 positions; display-only.
Price table description (Unlabeled field to the right of the price table)	The description associated with the price table. Alphanumeric, 30 positions; display-only
Item	A code representing a unit of inventory that you price with this price table. Item codes are defined in and validated against the Item table. Alphanumeric, 12 positions; display-only
SKU Code	Codes representing the item's unique characteristics, such as its color or size. The SKU displays only if the item has SKUs and if you set up the pricing information for this particular SKU only, rather than all SKUs of the item. Alphanumeric, three 4-position fields; display-only.
Group	The price table group that controls pricing for this item. In order to define a pricing structure whose type is either Group Quantity (type *2*) or Group Dollars (type *3*), you must first create the price table group. See First Work with Price Table Group Screen. If the Pricing type field is set to *1* for Item Quantity yet you enter a price table group code in this field, the system resets the pricing type to *3* for Group Dollars or *2* for Group Quantity, depending on which is the group's pricing type. Alphanumeric, 5 positions; required if the pricing type field is set to either 2 or 3.

Field	Description
Pricing type	Indicates how the system should evaluate when the item qualifies for a price break. If you associate the item with a group by entering a value in the Group field, the system will not allow you to select a pricing type that is not consistent with the group's pricing type. Valid values are: *Item Quantity* = The item qualifies for price breaks based on the total quantity the customer orders of this particular item/SKU. In Order Entry and Order Maintenance, the system will check the pricing detail information you enter at the bottom of this screen to determine how to reprice the item. The system selects the highest pricing level whose quantity is less than or equal to the quantity of the item on the order. **Note:** You cannot associate the item with a group if this field is set to 1. *Group Quantity* (default) = The item qualifies for price breaks based on the total quantity the customer orders of all items associated with the same group. In Order Entry and Order Maintenance, the system checks the pricing detail information you enter at the bottom of this screen, if any, to determine how to reprice the item; if there are no pricing levels defined for the item, the system checks the pricing levels defined for the group. The system selects the highest pricing level whose quantity is less than or equal to the quantity of all items from the group on the order. You cannot select Group Quantity as the pricing type unless the group also uses this pricing type. *Group Dollars* = The item qualifies for price breaks based on the total dollar value of all items on the order associated with the same group. In Order Entry and Order Maintenance, the system checks the pricing detail information you enter at the bottom of this screen, if any, to determine how to reprice the item; if there are no pricing levels defined for the item, the system checks the pricing levels defined for the group. The system selects the highest pricing level whose dollar value is less than or equal to the total value of all items from the group on the order. (For this purpose, the system uses the total value of items using the level 1, or highest, price.) You cannot select Group Dollars as the pricing type unless the group also uses this pricing type. If you select Group Dollars as the pricing type, the system revises the pricing level fields at the bottom of the screen so you can enter dollar level rather than quantity pricing information. See Dollar Pricing Level Information by Group. Required.

Field	Description
Maximum level	Indicates the maximum pricing level to apply to the item in Order Entry or Order Maintenance without a price override. You can define a maximum level if you want to provide your operators the discretion to offer a special price break for certain customers who place larger orders. The operator must use the price override code defined in the *Price Table Level Override Code (E05)* system control value to override the maximum defined here and still apply price table pricing. Numeric, 3 positions; optional.
Item premium	Indicates whether to offer a premium to customers who order a sufficient quantity or dollar total of the item. You can also define premiums at the group level. If you define both, the customer can earn both item premiums and group premiums on the same order. **Note:** The system offers the premium item in order entry only if the price of the ordered item is derived from the price table. When an order qualifies for one or more premiums, you advance to the *Display Premiums Screen (Price Table Premiums)* in Order Entry. (In Order Maintenance, you should select *Properties* to display this screen so that you will be able to change the premium or order information before accepting the order.) At this screen, you can indicate whether to add or remove the premium(s) from the order. The customer may not want the premium item, particularly if it is offered at an additional cost. Valid values are: *Selected* = The customer can earn a premium by ordering this item. *Unselected* (default) = The customer cannot earn a premium by ordering this item, although the total of this item may count toward a group premium.
Item	The item to offer as a premium on qualifying orders. Alphanumeric, 12 positions; required if the Item premium field is selected.
SKU	The SKU information that defines the premium item further. Alphanumeric, three 4-position fields; required if the Item premium field is selected and the premium item has SKUs.
Qty Req (Quantity required)	The total quantity of the item that the customer must order to qualify for the premium item. Numeric, 5 positions; required if the Item premium field is selected and you do not specify a dollar requirement.

Field	Description
$ Req (Dollars required)	The total dollar amount the customer must order of the price table item to qualify for the premium item. This is the net dollar amount; that is, it is calculated after applying price breaks through the price table. Numeric, 13 positions with a 2-position decimal; required if the Item premium field is set to Y and you do not specify a quantity requirement.
Qty to add (Quantity to add)	The quantity of the premium item to add to a qualifying order. Numeric, 5 positions; required if the Item premium field is selected.
Multiple	Indicates whether to multiply the quantity of premium items earned by the number of times the order meets the quantity or dollar requirement. For example, if the quantity requirement is 5 and the customer orders 10, this field indicates whether the customer earns 2 premium items or 1. Valid values are: *Selected* (default) = Multiply the premium items earned. *Unselected* = Offer just one premium item for each qualifying order.
Free gift	Indicates whether the premium item is a free gift. Valid values are: *Selected* = The premium item is free on qualifying orders. *Unselected* (default) = There is a charge for the premium item on qualifying orders. You will need to enter a premium price, below.
Price (Premium price)	The dollar amount to charge for the premium item on qualifying orders. **Premiums Offered at a Discounted Price** The system automatically adds premium items that are offered as a free item to the order. However, if the premium item is offered at a discounted price, instead of offered as a free item, the system does not automatically add the premium item to the order. Instead, you must select *Add to Order* for the premium item at the *Display Premiums Screen (Price Table Premiums)* in order to add the premium item to the order. Numeric, 13 positions with a 2-place decimal; required if the Item premium field is selected and the Free gift field is unselected.
Tax price (Tax-inclusive premium price)	The dollar amount to charge for the premium item on qualifying orders that are subject to VAT. Displayed only if the *Tax Included in Price (E70)* system control value is *selected*. Numeric, 13 positions with a 2-place decimal; optional.

Quantity Pricing Level Information by Item

The system displays the pricing level fields differently on the *Second Work with Price Table Item Screen* depending on whether you define a pricing type based on quantity or dollar value. A sample of the quantity pricing level field layout is presented below.

In Change mode, you can correct or delete existing pricing information. In Add mode, the pricing information fields are blank and enterable, so you can add new pricing information for the item. Select *Change* to switch between Add and Change modes.

> **Note:**
>
> Do not complete the pricing level fields if you want the item to take pricing level information from the group.

Field	Description
Level	The number of the pricing level. Numeric, 3 positions; display-only, assigned by the system.
Qty (Quantity)	The quantity of the item that the customer must order to qualify for the pricing level. Numeric, 5 positions; required.
Price	The unit price that the customer pays for items that qualify for the pricing level, before calculating any additional discount specified in the price table. Numeric, 13 positions with a 2-place decimal; required.
Disc $ (Discount dollar amount)	The amount to subtract from the unit price of items that qualify for the pricing level. For example, if the price is $10.00, and the discount is $1.00, the actual unit price the customer pays for items that qualify for the pricing level is $9.00. Numeric, 13 positions with a 2-place decimal; optional.
Disc % (Discount percentage)	The percentage to subtract from the unit price of items that qualify for the pricing level. For example, if the price is $10.00, and the discount is 15, the actual unit price the customer pays for items that qualify for the pricing level is $8.50. Numeric, 5 positions with a 2-place decimal; optional.
N/C (No charge)	Indicates whether the item is offered at no charge at this pricing level. You cannot enter a price, discount dollar amount, or discount percentage if the item is no charge. Valid values are: *Selected* = The item is no charge at this pricing level. *Unselected* = This item has a price.
Tax price (Tax-inclusive price)	The unit price that the customer pays for items that qualify for the pricing level, before calculating any additional discount specified in the price table, on orders subject to VAT. Displayed only if the *Tax Included in Price (E70)* system control value is *selected*. If the item is subject to VAT, the system applies any discounts as it normally would if using the regular (tax-inclusive) price. Numeric, 13 positions with a 2-place decimal; required.

Quantity pricing level example:

Level	Qty	Price	Disc	$	Disc %	N/C
1	1	10.00	NA	NA	NA	NA
2	5	9.00	NA	NA	NA	NA
3	10	8.50	NA	NA	NA	NA
4	15	8.00	NA	NA	NA	NA

If the customer orders:	the price is
1-4	$10.00 apiece
5-9	$9.00 apiece
10-14	$8.50 apiece
15 or more	$8.00 apiece

Even though you have defined a pricing level for the item, it is still subject to any discounts or premiums defined at the group level if the item is part of a price table group.

Dollar Pricing Level Information by Item

> **Note:**
>
> Do not complete the pricing level fields if you want the item to take pricing level information from the group.

Field	Description
Dollars	The total dollar amount of the item the customer must order to qualify for the pricing level. The system evaluates the total dollars using the first (highest) pricing level. For example, if the first pricing level is $10.00 for total dollars of $50.00, and the next pricing level is $9.00 for total dollars of $100.00, the system multiplies the unit quantity of the item by $10.00 to determine if the item qualifies for the pricing level. Numeric, 13 positions with a 2-place decimal; required.

Dollar pricing level example:

Level	Dollars	Price	Disc	$	Disc %	N/C
1	1.00	10.00	NA	NA	NA	NA
2	25.00	9.00	NA	NA	NA	NA
3	50.00	8.50	NA	NA	NA	NA
4	100.00	8.00	NA	NA	NA	NA

If the Customer's total order from the group comes to	*the price is*
$1.00 - $24.99	$10.00 apiece
$25.00 - $49.99	$9.00 apiece
$50.00 - $99.99	$8.50 apiece
$100.00+	$8.00 apiece

> **Note:**
>
> The total order from the group is calculated using the highest (level one) price.

Even though you have defined a pricing level for the item, it is still subject to any discounts or premiums defined at the group level.

> **Note:**
>
> Complete the pricing level fields only if you want the item to use different pricing level information than the group (if any) it belongs to. If you are changing between a quantity and a dollar pricing type and pricing level information exists for the item, you can use *Clear* to clear the fields so that you can then display the desired field format; however, this will clear all but the default fields (Pricing type, Item premium, Multiple, and Free gift) as well.

Screen Option	Procedure
Switch between Add and Change mode	Select *Change*. If you are currently in Add mode (in which there are blank pricing fields for you to enter) you will switch to Change mode (in which the existing pricing information displays for you to correct or delete it). If you are currently in Change mode, you will switch to Add mode.
Clear all but the default fields	Select *Clear*. **Note:** This option is not available in Add mode.

Copy Price Table Item Window

To copy: Select *Copy* for an item at the *First Work with Price Table Item Screen* to display the Copy Price Table Item pop-up window.

You can copy the information to the same item code in a different price table, a different item code in the same price table, or a different item code in a different price table. Each field on this screen is described under *Create Price Table Screen* and *Second Work with Price Table Item Screen*.

First Work with Price Table Group Screen

Purpose: Use this screen to create, change, copy, delete, or review pricing information for a group of items within a price table.

How to display this screen: Select *Work w/Groups* for a price table at the *Work with Price Table Screen*.

Field	Description
Group	A code representing a group of items within a price table that share pricing information. Alphanumeric, 5 positions; optional.
Description	The description associated with the price table group. Alphanumeric, 30 positions; optional.

Screen Option	Procedure
Create a new price table group	Select *Create* to advance to the *Create Price Table Group Screen*.
Change a price table group	Select *Change* for a group to advance to the *Third Work with Price Table Group Screen*.
Copy a price table group	Select *Copy* for a group to advance to the *Copy Price Table Group Window*.
Delete a price table group	Select *Delete* for a group to delete it.
Display a price table group	Select *Display* for a group to advance to the *Third Work with Price Table Group Screen*; each field will be display-only.

Create Price Table Group Screen

Purpose: Use this screen to define a group's code and description before completing its pricing information.

How to display this screen: Select *Create* at the *First Work with Price Table Group Screen*.

Field	Description
Group	A code representing a group of items within a price table that share the same pricing type, group premium (if any), and, potentially, pricing level information. Alphanumeric, 5 positions; required.
Description	The description associated with the price table group. Alphanumeric, 30 positions; required.

Completing this screen: You advance to the *Second Work with Price Table Group Screen*.

> **Note:**
>
> If you exit the *Second Work with Price Table Group Screen* without entering pricing information for the item, you return to the *First Work with Price Table Group Screen*. Your cursor will be positioned at the group code you have just entered; however, the system will not have created the record. You must create the group again by selecting *Create*.

Second Work with Price Table Group Screen

Purpose: Use this screen to specify pricing information for a group of items within a price table.

How to display this screen: Complete the *Create Price Table Group Screen*.

> **Note:**
>
> The detail lines at the bottom of the screen display differently depending on whether the pricing type is based on quantity or dollars. See Dollar Pricing Level Information by Group.

Field	Description
Price table	The price table containing the group. Alphanumeric, 5 positions; display-only.
Price table description (Unlabeled field to the right of the price table)	The description associated with the price table. Alphanumeric, 30 positions; display-only.
Group	The group of items within the price table whose pricing information you are defining. Alphanumeric, 5 positions; display-only.
Description	The description associated with the price table group, as you defined it on the *Create Price Table Group Screen*. You have the option of changing it here. Alphanumeric, 30 positions; required.
Price type	Indicates how the system should evaluate when items belonging to this group qualify for a price break. Valid values are: *Group Quantity* (default) = Items qualify for price breaks based on the total quantity the customer orders of all items associated with this group. In Order Entry and Order Maintenance, the system checks the pricing detail information you entered for the item, if any, to determine how to reprice the item; if there are no pricing levels defined for the item, the system checks the pricing levels defined for the group. The system selects the highest pricing level whose quantity is less than or equal to the quantity of items from the group on the order. *Group Dollars* = Items qualify for price breaks based on the total dollar value of all items on the order associated with this group. In Order Entry and Order Maintenance, the system checks the pricing detail information you entered for the item, if any; if there are no pricing levels defined for the item, the system checks the pricing levels defined for the group. The system selects the highest pricing level whose dollar value is less than or equal to the total value of items from the group on the order. For this calculation, the system uses each item's level 1 (highest) price. If you select Group Dollars as the price type, the system revises the pricing level fields at the bottom of the screen so you can enter dollar level rather than quantity pricing information. See *Dollar Pricing Level Information by Group*. Required.

Field	Description
Discount % (Discount percentage)	The percentage discount to subtract from the item price of every item within the price table group, after applying any discounts you define at pricing level detail lines, either for an item within the group or at the group level. For example, if you define a discount of 15% here, and an additional discount of $1.00 for the first pricing level for an item or group, the system subtracts the discount amount from a $10.00 price as follows: `$10.00 - $1.00 = $9.00` `$9.00 - $1.35 (15% of $9.00) = $7.65` The customer pays $7.65 for the item. Numeric, 5 positions with a 2-place decimal; optional.
Group premium	Indicates whether the customer can earn a premium item for total orders within the price table group. If you have defined an item premium for an individual item within the group, the customer can earn both premiums. When an order qualifies for one or more premiums, you advance to the *Display Premiums Screen (Price Table Premiums)* in Order Entry. At this screen, you can indicate whether to add or remove the premium(s) from the order. The customer may not want the premium item, particularly if it is offered at an additional cost. (In Order Maintenance, you can display this screen by selecting *Premiums*, and then make any necessary changes before selecting *Accept* to accept.) Valid values are: *Selected* = The customer can earn a premium item. *Unselected* = The customer cannot earn a premium item from this group.
Item	The code representing the item you are offering as a group premium. Item codes are defined in and validated against the Item table. Alphanumeric, 12 positions; required if the Group premium field is selected.
SKU	The premium item's unique characteristics, such as its color and size. Alphanumeric, three 4-position fields; required if the Group premium field is selected and the item has SKUs.
Qty reqd (Quantity required)	The total unit quantity the customer must order of items belonging to the group in order to qualify for the premium item. Numeric, 5 positions; required if the Group premium field is selected and you do not specify a dollar requirement.
$ Reqd (Dollars required)	The total dollar amount the customer must order of items within the group to qualify for the premium item. The dollar total is the net total; that is, it is calculated based on the dollars *after* applying discounts and repricing through the price table. Numeric, 13 positions with a 2-position decimal; required if the Group premium field is selected and you do not specify a quantity requirement.
Qty to add (Quantity to add)	The unit quantity of the premium item to add to a qualifying order. Numeric, 5 positions; required if the Group premium field is selected.

Field	Description
Multiple	Indicates whether to multiply the premium item quantity by the number of times the order qualifies for the premium. For example, if the dollar requirement for 2 free premium items is $100.00, and the group total is $200.00, this field indicates whether the customer has earned 2 or 4 premiums. Valid values are: *Selected* (default) = The customer earns an additional premium item (or quantity of the premium item, if the Qty to add field is equal to more than *1*) for each multiple of the qualifying quantity or dollars. *Unselected* = The customer earns only one premium item (or quantity of the premium item, if the Qty to add field is equal to more than *1*) per order.
Free gift	Indicates whether to add the premium item to the order as a free gift, or whether there is a price attached to the premium item. Valid values are: *Selected* = Add the premium item to the order free of charge. *Unselected* (default) = There is a charge for the premium item.
Price	The price to charge for the premium item, if the Free gift? field is *unselected*. **Premiums Offered at a Discounted Price** The system automatically adds premium items that are offered as a free item to the order. However, if the premium item is offered at a discounted price, instead of offered as a free item, the system does not automatically add the premium item to the order. Instead, you must select *Add to Order* for the premium item at the *Display Premiums Screen (Price Table Premiums)* in order to add the premium item to the order. Numeric, 13 positions with a 2-place decimal; required if the Group premium field is selected and the Free gift field is unselected
Tax price (Tax-inclusive premium price)	The dollar amount to charge for the premium item on qualifying orders that are subject to VAT. Displayed only if the *Tax Included in Price (E70)* system control value is *selected*. Numeric, 13 positions with a 2-place decimal; optional.

Quantity Pricing Level Information by Group

The system displays the pricing level fields differently on the Second Work with Price Table Group Screen depending on whether you define a price type based on quantity or dollar value.

Field	Description
Level	The number of the pricing level. The system assigns a sequential number to each pricing level after you enter the information. Numeric, 3 positions; display-only, assigned by the system.
Qty (Quantity)	The quantity of items within the group that the customer must order to qualify for the pricing level. Numeric, 5 positions; required.
Price	The unit price that the customer pays for items that qualify for the pricing level, before calculating any additional discount. Numeric, 13 positions with a 2-place decimal; required.

Field	Description
Disc $ (Discount dollar amount)	The amount to subtract from the unit price of items that qualify for the pricing level. For example, if the price is $10.00, and the discount is $1.00, the actual unit price the customer pays for items that qualify for the pricing level is $9.00. This discount is applied before the *Discount % (Discount percentage)*, if any, defined for the group. Numeric, 13 positions with a 2-place decimal; optional
Disc % (Discount percentage)	The percentage to subtract from the unit price of items that qualify for the pricing level. For example, if the price is $10.00, and the discount is 15, the actual unit price the customer pays for items that qualify for the pricing level is $8.50. Numeric, 5 positions with a 2-place decimal; optional.
N/C (No charge):	Indicates whether items within the group are offered at no charge at this pricing level. You cannot enter a price, discount dollar amount, or discount percentage if the item is no charge. Valid values are: *Selected* = The items are no charge at this pricing level. *Unselected* = This item has a price at this level.
Tax price (Tax-inclusive price)	The unit price that the customer pays for items in the group that qualify for the pricing level, before calculating any additional discount specified in the price table, on orders subject to VAT. Displayed only if the *Tax Included in Price (E70)* system control value is *selected*. If the item is subject to VAT, the system applies any discounts as it normally would if using the regular (tax-inclusive) price. Numeric, 13 positions with a 2-place decimal; required.

Quantity pricing level example:

Level	Qty	Price	Disc	$	Disc %	N/C
1	1	10.00	NA	NA	NA	NA
2	5	9.00	NA	NA	NA	NA
3	10	8.50	NA	NA	NA	NA
4	15	8.00	NA	NA	NA	NA

If the customer orders:	the price is:
1-4	$10.00 apiece
5-9	$9.00 apiece
10-14	$8.50 apiece
15 or more	$8.00 apiece

If you define pricing level details for any item that belongs to the group, the system uses those prices, although it still uses the total quantity for the group to determine the qualifying price level.

Dollar Pricing Level Information by Group

Field	Description
Dollars	The total dollar amount of items associated with the group that the customer must order to qualify for the pricing level. The system evaluates the total dollars using the first (highest) pricing level. For example, if the first pricing level is $10.00 for total dollars of $50.00, and the next pricing level is $9.00 for total dollars of $100.00, the system multiplies the unit quantity of the item by $10.00 to determine the qualifying price level. Numeric, 13 positions with a 2-place decimal; required.

Dollar pricing level example:

Level	Dollars	Price	Disc	$	Disc %	N/C
1	1.00	10.00	NA	NA	NA	NA
2	25.00	9.00	NA	NA	NA	NA
3	50.00	8.50	NA	NA	NA	NA
4	100.00	8.00	NA	NA	NA	NA

If the customer's total order from the group comes to:	the price is:
$1.00 - $24.99	$10.00 apiece
$25.00 - $49.99	$9.00 apiece
$50.00 - $99.99	$8.50 apiece
$100.00+	$8.00 apiece

> **Note:**
>
> The total order from the group is calculated using the highest (level one) price.

If you have defined unique pricing level information for an item, it is still subject to any discounts or premiums defined at the group level if it belongs to a group.

How to complete this screen: If you are changing between a quantity and dollar pricing type, select *OK* to change the pricing level field format. Complete the pricing level fields only if you want items within the group to inherit group-level pricing information (for each item that has no item-level pricing information defined).

> **Note:**
>
> If you are changing between a quantity and a dollar pricing type and pricing level information exists for the group, you can use *Clear* to clear the fields so that you can then display the desired field format; however, this will clear all but the default fields (Price type, Group premium, Multiple and Free gift) as well.

Third Work with Price Table Group Screen

To change: Select *Change* for a group at the *First Work with Price Table Group Screen*. You can also advance to this screen in display-only mode by selecting *Display* for a group at the First Work with Price Table Group Screen. In change mode, you can change any information on this screen except the price table and group. For field descriptions, see *Second Work with Price Table Group Screen*.

Copy Price Table Group Window

To copy: Select *Copy* for a price table group at the *First Work with Price Table Group Screen* to display this window:

You must complete each field in this window to copy the group. You can copy the group to a different group within the same price table, or to a different price table.

If you *select* the Copy price table item field, the system will copy each price table item along with the group as long as the item does not already exist for that price table. The system will not replace an existing price table item record. If you *select* the Copy price table item field, the system copies only the group information.

The system does not copy the group description. You must select *Change* for the destination group to enter a description.

Package Insert Processing (WPIP)

Package inserts are items to add to an order automatically in Order Entry based on any of the following criteria:

- customer *Class*
- *State* (state)
- *Item*
- item *Class*
- *Item category*
- *Source* code
- *List source*
- *Offer*
- *Promotion code*
- *Mail type (Current, Original)*
- all orders
- *Item category* and *State* (state)

These items are referred to as package inserts because you may want to use this function to identify flyers, catalogs, stuffers and other materials that should be put inside the package (box) with the items the customer ordered. You can also use this function to add any type of promotional item to the order free of charge.

For each criterion (customer class, state, source code etc.), you can define up to 10 items to add to the order if the order meets the specified criterion.

These package insert items must be valid items in the Item table. Once added to the order, these items process through the system as would any item on an order.

When and how are items added: The system determines if the order is eligible for a package insert item during repricing, the initial order accept, and the final order accept; if the order is eligible for a package insert item, the system applies it to the order.

These items are added to the order without any interaction with the operator unless the package insert item requires special handling (monogramming, engraving, etc.).

Retail channel orders (orders whose Internet Order field in the Order Header table is *P*) do not qualify for package insert items.

Special handling: If the package insert item requires special handling, the *Work with Special Handling Screen* or *Work with Custom Special Handling Screen* displays. You can enter special handling information or select *Reject* to exit from the window without entering any special handling instructions.

> **Note:**
>
> If a package insert item contains special handling, the system displays the special handling window during repricing, initial order accept, and the final order accept. This is because the system reevaluates the order to see if it still qualifies for the item, and if it does, the system adds the item back to the order. You will need to reenter any special handling information you had previously defined for the item.

When you create orders through the *Generic Order Interface (Order API)*, even if the package insert item is flagged for special handling, no special handling is applied.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Free of charge: All package insert items are added to the order free of charge using the *Default Price Override Reason (B35)* system control value.

Related system control value: The system adds package insert items to the order (interactive order entry and web orders) only if the *Evaluate Promotional Items/Inserts in Order Entry/Maintenance (E48)* system control value is *selected*.

Multiple package insert items: An order may be eligible for several package insert items if the order meets more than one criterion. Package inserts are added to the order for each criterion met; however, the same package insert are not added more than once. The system evaluates the criteria in the following sequence:

- item category/state combination
- customer class
- state
- item
- item class
- item category
- source code
- list source

- offer
- promotion
- mail type
- all orders

Because all package insert items are added to the order if eligible, sequence is only important if the same item exists under more than one criterion with a different quantity. The quantity that is used is the quantity associated with the first occurrence of the package insert.

For example, if item A is a package insert item for customer class VP with a quantity of 2 and item A is also a package insert for source code B123 with a quantity of 5, and the order matches both the customer class and source code criteria, item A is added to the order with a quantity of 2 because customer class is evaluated before source code.

In this topic:

- *Work with Package Inserts Screen*
- *Work with Inserts for Customer Class Screen*
- *Create Insert for Customer Class Screen*
- *Other Package Insert Criteria*
- *Rules for Adding Package Inserts to Orders*

Work with Package Inserts Screen

Purpose: This screen shows the 12 criteria that can be used to determine whether package insert items should be added to the order.

How to display this screen: Select Work with Package Insert from a menu or enter *WPIP* in the Fast path field at the top of any menu.

Selecting criteria: Select *Work With* for a criterion to advance to the Work with Insert screen for the selected option. For example, if you select *Work With* for customer class, you advance to the *Work with Inserts for Customer Class Screen*.

Every Work with Insert screen contains the qualifying criterion and allows you to define up to 10 items and associated quantities that to add to the order if the order meets the criteria. All of the screens function similarly.

See *Other Package Insert Criteria* for definition of each criterion.

Work with Inserts for Customer Class Screen

Purpose: This screen shows all of the customer classes for which package inserts have been established.

How to display this screen: Select *Work With* for Customer Class at the *Work with Package Inserts Screen*.

Field	Description
Class	A code used to group customers for reporting, upselling, and restrictions or exclusions. Alphanumeric, 2 positions; optional.

Screen Option	Procedure
Create package inserts for the selected criteria	Select *Create* to advance to the *Create Insert for Customer Class Screen*.
Change an insert	Select *Change* for a criterion to advance to the Change Insert for Customer Class screen. For field descriptions, see Create Insert for Customer Class Screen. To remove an existing package insert item, delete the Item and SKU fields and then select *OK*.
Delete an insert	Select *Delete* for a criterion to delete it.
Display an insert	Select *Display* for a criterion to advance to the Display Insert for Customer Class screen. You cannot change any fields on this screen. For field descriptions, see Create Insert for Customer Class Screen.

Create Insert for Customer Class Screen

To create: Select *Create* at the *Work with Inserts for Customer Class Screen*.

Field	Description
Customer class	The customer class for the package insert items. The customer class is a code used to identify a group of customers. You assign a customer to a customer class in the Customer Sold-to table. Customer class codes are defined in the Customer Class table. See *Setting Up the Customer Class Table (WCCL)*. If the sold-to customer on the order is assigned this customer class, the items listed below are automatically added to the order. Alphanumeric, 2 positions; required.
Item	The code for the item to automatically add to the order if the sold-to customer is associated with this customer class. The item you enter is validated against the Item table. The item cannot be a variable set (*V* kit type). You can define up to 10 items for a particular customer class. You must enter at least one item. Alphanumeric, 12 positions; required.
Colr/Size/Othr	The style of the item, such as its color and size. Use these fields to enter the SKU code for the item to automatically add to the order. The SKU you enter is validated against the SKU table. Alphanumeric, three 4-position fields; required if the item has SKUs.
Qty (Quantity)	The number of units of the item to add automatically to the order. If the item has a sell quantity defined in the Item table, the quantity entered here should be a multiple of the sell quantity. Numeric, 7 positions; required.

Other Package Insert Criteria

Package inserts can automatically be added to an order based on 12 criteria in addition to customer class, described under *Create Insert for Customer Class Screen*.

Field	Description
Inserts for Item Category/State Combination	
Item Category	The item category for which the package inserts have been defined. The item category is validated against the Item Category table. See *Working with Item Classes (WICL)*. If the ship-to customer on the order is associated with the specified country/state and the customer orders any item belonging to this item category and the item is not soldout, the associated package inserts are automatically added to the order. Alphanumeric, 4 positions; required.
Country	The country for which the package inserts have been defined. Country codes are defined in and validated against the Country table, which is accessible through the Work with Countries menu option; see *Setting Up the Country Table (WCTY)*. If the ship-to customer on the order is associated with this country/state and the customer orders any item belonging to the specified item category and the item is not soldout, the associated package inserts are automatically added to the order. Alphanumeric, 3 positions; required.
State	The state for which the package inserts have been defined. State codes are defined in and validated against the State table, which is accessible through the Work with Countries menu option; see *Setting Up the Country Table (WCTY)*. If the ship-to customer on the order is associated with this country/state and the customer orders any item belonging to the specified item category and the item is not soldout, the associated package inserts are automatically added to the order. Alphanumeric, 2 positions; required only if the country requires state.
Inserts for State	
Country	The country for which the package inserts have been defined. Country codes are defined in and validated against the Country table, which is accessible through the Work with Countries menu option; see *Setting Up the Country Table (WCTY)*. If the ship-to customer on the order is associated with this state, the associated package inserts are automatically added to the order. Alphanumeric, 3 positions; required.
State	The state for which the package inserts have been defined. State codes are defined in and validated against the State table, which is accessible through the Work with Countries menu option; see *Setting Up the Country Table (WCTY)*. If the ship-to customer on the order is associated with this state, the associated package inserts are automatically added to the order. Alphanumeric, 2 positions; required only if the country requires state.
Inserts for Item	

Field	Description
Item	The item for which the package inserts have been defined. The item is validated against the Item table. If the customer orders this item and the item is not soldout, the associated package inserts are automatically added to the order. Alphanumeric, 12 positions; required.
Colr/Size/Othr	Optionally, the SKU for which the package inserts have been defined. The SKU is validated against the SKU table. See *Performing Initial Item Entry (MITM)*. If the customer orders this item and the item is not soldout, the associated package inserts are automatically added to the order. If no SKU is defined, the package inserts are added to the order if the customer orders any SKU of the item. Alphanumeric, three 4-position fields; optional.
Inserts for Item Class	
Item Class	The item class for which the package inserts have been defined. The item class is validated against the Item Class table. See *Working with Item Classes (WICL)*. If the customer orders any item belonging to this item class and the item is not soldout, the associated package inserts are automatically added to the order. Alphanumeric, 3 positions; required.
Inserts for Item Category	
Item Category	The item category for which the package inserts have been defined. The item category is validated against the Item Category table. See *Working with Item Classes (WICL)*. If the customer orders any item belonging to this item category and the item is not soldout, the associated package inserts are automatically added to the order. Alphanumeric, 4 positions; required.
Inserts for Source	
Source Code	The source code for which the package inserts have been defined. The source code is validated against the Source Code table. See *Working with Source Codes (WSRC)*. If the customer places an order and this is the source code on the header of the order, the associated package inserts are automatically added to the order. Alphanumeric, 9 positions; required.
Inserts for List Source	
List Source	The list source for which the package inserts have been defined. The list source is entered on the Source Code table. No validation occurs. See *Working with Source Codes (WSRC)*. If the customer places an order and the source code on the header of the order is associated with this list source, the associated package inserts are automatically added to the order. Alphanumeric, 7 positions; required.

Field	Description
Inserts for Offer	
Offer	The offer for which the package inserts have been defined. The offer is validated against the Offer table. See *Working with Offers (WOFR)*. If the customer places an order and the source code on the header of the order points to this offer, the associated package inserts are automatically added to the order. Alphanumeric, 3 positions; required
Inserts for Promotion	
Promotion	The promotion for which the package inserts have been defined. The promotion is validated against the Promotion table. See *Working with Promotions (WPRO)*. If the customer places an order and the source code on the header of the order points to this promotion, the associated package inserts are automatically added to the order. Alphanumeric, 7 positions; required
Inserts for Mail Type	
Mail Type	The mail type for which the package inserts have been defined. Valid mail types are: *B* = buyer *C* = catalog request *R* = recipient *L* = rental *S* = suspect/prospect *' '* (blank) = no mail type defined See *Work with User Fields Screen*. If sold-to customer has this current mail type, the associated package inserts are automatically added to the order. For example, if the sold-to customer has a current mail type of C (catalog request), the package inserts created for mail type C is automatically added to the order. Alphanumeric, 1 position; required or leave blank to define package inserts for customers with no current mail type.
Inserts for All Orders	
All	All Package inserts defined under this criterion are added to every order. When you select this option, no value is entered. You just enter the package insert items and quantities.

Rules for Adding Package Inserts to Orders

- If the order is a multiple-recipient order, each order is evaluated on an order ship-to by order ship-to basis when determining whether the order qualifies for a package insert.
- The package insert item is not added to the order if the qualifying item (through either item, item class, or item category) is soldout.
- The system evaluates the order to determine if it is eligible for the package insert during repricing, initial order accept, and final order accept; if the order is no longer eligible, the system deletes it.

- The package insert item is added to the order using the earliest arrival date of any one open item on the order.
- The package insert item may ship by itself if all other items on the order are backordered. To prevent this from occurring, you may want to create the package insert item as a non-inventory item in the Item table or assign the item to a coordinate group code. Items with a coordinate group code are designed not to generate a pick slip unless there are other items on the order to be shipped at the same time.
- Package insert items are not added to the order if the order type on the order matches the order type defined in *Order Type to Process as Catalog Request/Item Samples (E08)* system control value.
- Package insert items are not added to the order if the qualifying item (through item, item class, or item category) has a negative quantity.
- Package insert items are not added to the order if the order total is negative.
- Package insert items are not added to the order if the order has a ship via with a Billing Code of *Express Bill*.
- No special handling applies to package insert items added to orders you create through the *Generic Order Interface (Order API)*.
- Package insert items cannot be qualifying items to add other package insert items.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Troubleshooting: If a package insert item did not get added to the order, you should check the following:

- System control value to *Evaluate Promotional Items/Inserts in Order Entry/Maintenance (E48)* should be *selected*.
- System control value for *Default Price Override Reason (B35)*must contain a valid price override reason code.
- The system evaluates the order to see if it is eligible for the package insert during repricing, initial order accept, and final order accept. The package insert may have been removed from the order if it no longer qualified.
- Restricted field in the SKU table for the package insert item should be *unselected*.
- Sell quantity field in the Item table for the package insert item should be blank. If a sell quantity must exist, the quantity of the package insert item to be added to the order should be a multiple of the sell quantity.
- The order type on the order should not be the same as the order type defined in the *Order Type to Process as Catalog Request/Item Samples (E08)* system control value.

Working with Coupon Promotions (WCPR)

Purpose: You can use coupon promotions to offer percentage or dollar discounts on merchandise to customers. You can set up a coupon to apply to a particular order line only, or the entire order. You can also restrict a coupon to, for example, a particular offer, source code, or item, and make certain items exempt from a coupon discount.

You apply coupons to items or orders in order entry or order maintenance through the *Coupon Discount Window*. You can also apply coupons through the *Generic Order Interface (Order API)* by specifying a coupon at the order header or detail level; see *Inbound Order*

XML Message (CWORDERIN) and *Understanding Coupon Error Messages through the Order API* for more information.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

In this topic:

How Coupons Work

Two basic types of coupons: In addition to applying either a percentage or a dollar discount, coupons can be either:

- *order-level* (*Coupon type* = *O*): the discount applies to all eligible order detail lines.
- *detail-level* (*Coupon type* = *D*): the discount applies to the selected order detail line only.

Applying a coupon to an item or order: You can add coupons to the order at the Coupon Discount window, which you can display by:

- order-level or detail-level coupons: select *Coupon* for an item.
- order-level coupons only: select *Reprice*.

When can you enter a coupon on an order? You can use the *Coupon Discount Window* to work with coupons at any point in order entry or order maintenance as long as none of the items has printed pick slips or is in a closed (*X*) status. See *Entering Coupon Promotions on an Order*.

Applying coupons in order maintenance: In order for you to apply coupons to an order in order maintenance:

- You must have the *Price Tables (E07)* system control value at the *Pricing Values (B31)* screen *selected*, or
- You must use *Customer Price Group Pricing*; see *Customer Price Group Pricing in Order Maintenance*.

How is tax calculated? Tax is calculated based on the actual price the customer is paying after applying all coupons and other discounts.

Do coupons apply to freight charges? Coupons apply to merchandise prices only; however, discounts applied to the merchandise on an order can have the effect of also reducing freight charges, if freight charges are based on total merchandise value. To offer freight or handling discounts, you can use additional discounting options, such as *Working with Promotions (WPRO)*.

How an Order or Item Qualifies for a Coupon

Valid coupon? When you enter a coupon at the *Coupon Discount Window* in order entry or order maintenance, the system determines whether the coupon is valid based on your entries through the *Work with Coupon Promotion Screen*. Also, the system confirms that the current system date is within the *Start date* and *End date* for the coupon.

Qualifiers: Next the system determines whether the order or detail line qualifies for the coupon based on:

- *order lines are open or held:* There cannot be any detail lines on the order with printed pick slips, or in a closed (*X*) status.
- *duplicate coupon entry:* The same coupon cannot already have been applied to the item (detail-level coupon) or order (order-level coupon).
- *source code:* If the *Source requirement* field for the coupon is *selected*, then the source code on the order header must be one of the source codes specified through the *Work with Coupon Source Requirement Screen*.
- *offer:* If the *Offer requirement* field for the coupon is *selected*, then the source code on the order header must point to one of the offers specified through the *Work with Coupon Offer Requirement Screen*.
- *other coupons:* If the *Coupon restriction* field for the coupon is *selected* for any coupons on the order, then there must not be a coupon restriction set up for these coupons through the *Work with Coupon Restriction Screen*.
- *item requirement:* If the *Item requirement* field for the coupon is *selected*, and the coupon is:
- order-level: the item(s) specified through the *Work with Coupon Item Requirement Screen* must be on the order; in this case, the discount applies only to the required item(s)
- detail-level: the item on the order detail line must be the one specified through the *Work with Coupon Item Requirement Screen*; you cannot specify more than one item requirement for a detail-level coupon

- *order detail line minimum:* If the *Minimum detail $ amt* specifies a dollar value, then the regular single-unit offer price of the item or SKU must be equal to or greater than that value.
- *order total minimum:* If the *Minimum order $ amt* specifies a dollar value, then the total merchandise value on the order, excluding any non-discountable items, must be equal to or greater than this value. In this case, the total merchandise value is calculated based on the regular, single-unit offer price of each item or SKU.

> **Note:**
>
> See below for more information on how an order or detail line qualifies for a dollar minimum.

- *item restriction:* If the coupon is detail-level and carries a percentage discount, the item in the order detail line must not be restricted (as set up through the *Work with Coupon Item Restriction Screen*). However, an item is still eligible for an order-level or detail-level dollar discount, and its extended price is included in the order total for the purposes of evaluating the *Minimum order $ amt*.
- *non-discountable items:* If the coupon is detail-level, then the item must be flagged as *Discountable*; also, non-discountable items are not included in the order total for the purposes of determining the *Minimum order $ amt*. If all of the items on an order are non-discountable, then the order does not qualify for a coupon.

For more information: See *Understanding Coupon Error Messages in Order Entry* for a listing of the error messages the system displays when items or orders are not eligible for coupons.

Combining coupons with other discounts: You can offer a variety of additional discounts and pricing options in addition to coupons. When combining additional discounts and repricing:

- *Quantity break price:* If the order detail line qualifies for a quantity break price that you have set up at the *Create Item Price Screen (Quantity Price Breaks by Offer)*, then the coupon discount applies to the quantity break price. For example, if the coupon discount is $1.00, the regular price for a single unit is $20.00, and the quantity break price for five units is $19.00, the $1.00 coupon discount applies to the break price of $19.00 when the customer orders five or more units.
- *Price code price:* If the order detail line qualifies for a price code discount that you have set up through *Working with Price Codes (WPCD)*, then the coupon discount applies to the price code price. For example, if the coupon discount is $1.00, the regular price for a single unit is $20.00, and the price code price for five units is $19.00, the $1.00 coupon discount applies to the price code price of $19.00 when the customer orders five or more units.
- *Price override:* If you enter a price override reason code for an item in order entry or order maintenance, then the coupon discount applies to the overridden price. For example, if the regular price of an item is $20.00, but you override the price to $15.00 and then apply a coupon with a 10% discount, the 10% is taken from the price of $15.00.
- *Promotions:* If you use *Working with Promotions (WPRO)* to set up an order promotion (*Type* = *O*), then this promotion discount applies after any coupon discount. For example, if a coupon applies a discount of 10%, an order-level promotion carries a discount of $1.00, and the item price is $20.00, the 10%

coupon discount applies first, reducing the unit price to $18.00; then the promotion discount of $1.00 applies.

- *Customer price group price:* If you are using *Customer Price Group Pricing*, the system applies order-level coupons after all other discounts and promotions are applied to the order. The system applies the order-level coupon promotion to all lines eligible for the coupon promotion, including non-discountable items. See *Order-Level Coupon Promotions when using Customer Price Group Pricing*.

> **Note:**
>
> An order-type promotion discount can be prorated against the order lines or applied as a negative additional charge, depending on your setup. See *Working with Promotions (WPRO)* for more information.

If the coupon discount exceeds the merchandise value: If the total coupon discount amount of a detail-level coupon exceeds the extended price of the item, then the extended price of the item is set to zero. Similarly, if the total coupon discount amount of an order-level coupon exceeds the total merchandise value of the order, the total merchandise value is set to zero. The coupon does not create a negative (credit) extended item price or order total.

What price does the system use to evaluate order or detail qualifying amounts? When a coupon has a *Minimum detail $ amt* or *Minimum order $ amt* requirement, the system uses the initial price on the order line to determine whether the order or detail line meets the minimum requirement.

- *Order detail line minimum:* The system always considers the regular, single-unit price of the item or SKU when determining whether an order detail line meets the minimum requirement. For example, if the minimum is $50.00, and the customer orders two units at $30.00, the order detail line does not meet the order detail minimum requirement based on the single unit price of $30.00.
- *Order minimum:* The system always considers the total merchandise value based on the regular, single-unit prices of the entire quantity of all eligible items on the order when determining whether the order meets the minimum requirement. For example, if the order minimum is $50.00, and the customer orders two units at $30.00 as above, the order does meet the order minimum requirement based on the total merchandise value of $60.00.
- *If there is a price override:* The system still uses the regular, single-unit price of the item or SKU to evaluate the order or line for a dollar minimum if you use a price override reason code whose *Override item offer price* field is *unselected*. However, if this field is *selected*, the system uses the price override amount to evaluate the order or line for a dollar minimum. See *Overriding the Item/SKU Offer Price* for an overview.

If you apply multiple coupons to the same order or line, the system does not subtract the first coupon before determining whether the order qualifies for the second one. For example, *COUPA* carries a discount of 10%, and *COUPB* carries a discount of $1.00. The minimum dollar value for both coupons is $25.00, and that is the price for the order detail line. The order line qualifies for both coupons.

Please note the following variations in evaluating how an order or order line qualifies for a dollar minimum:

Variation	Detail Minimum = $25.00	Order Minimum = $50.00
basic qualification	1 unit at $10: does not qualify 1 unit at $100: qualifies	2 units at $10: does not qualify 1 unit at $100: qualifies
multiple units	3 units at $10 (total = $30): does not qualify 1 unit at $25: qualifies	5 units at $10: qualifies
quantity break price (as set up through *Create Item Price Screen (Quantity Price Breaks by Offer)*)	1 unit at $25: qualifies 2 units at $20 quantity break price; regular single-unit price is $25: qualifies	2 units at $20 quantity break price; single-unit price is $25; qualifies
multiple coupons	1 unit at $25; 2 coupons, each requiring a $25 minimum: qualifies for both coupons	2 units at $25; 2 coupons, each requiring a $50 minimum; qualifies for both coupons
non-discountable item (the item's *Discountable* field is *selected*)	cannot apply coupon discount to non-discountable item unless you are using *Customer Price Group Pricing*	4 units at $10, plus 1 unit of a non-discountable item at $10: does not qualify unless you are using *Customer Price Group Pricing* Non-discountable item price is not included in the order minimum unless you are using *Customer Price Group Pricing*
restricted item (as set up through the *Work with Coupon Item Restriction Screen*)	dollar discounts: normal qualification rules percentage discounts: do not apply	dollar discounts: normal qualification rules percentage discounts: 3 units at $10 plus 1 unit of a restricted item at $20: percentage discount applies to the 3 regular units

Variation	Detail Minimum = $25.00	Order Minimum = $50.00
price override (*Override item offer price* for the price override reason is *selected*)	item/SKU price = $25.00, price override = $20.00: does not qualify item/SKU price = $20.00, price override = $25.00: qualifies no item/SKU price, price override = $25.00: qualifies	item/SKU price = $25.00, price override = $20.00, 2 units: does not qualify item/SKU price = $20.00, price override = $25.00, 2 units: qualifies no item/SKU price, price override = $25.00, 2 units: qualifies

Variation	Detail Minimum = $25.00	Order Minimum = $50.00
price override (*Override item offer price* for the price override reason is *unselected*)	item/SKU price = $25.00, price override = $20.00: qualifies item/SKU price = $20.00, price override = $25.00: does not qualify no item/SKU price, price override = $25.00: does not qualify **Note:** In this situation, an item without an item/SKU price can never qualify for a coupon minimum dollar amount.	item/SKU price = $25.00, price override = $20.00, 2 units: qualifies item/SKU price = $20.00, price override = $25.00, 2 units: does not qualify no item/SKU price, price override = $25.00, 2 units: does not qualify **Note:** In this situation, an item without

Variation	Detail Minimum = $25.00	Order Minimum = $50.00

an item/SKU price can never be counted toward the coupon minimum

Variation	Detail Minimum = $25.00	Order Minimum = $50.00
		dollar amount.

Sequence of discount application: The following rules control the sequence in which multiple coupons apply to an order or single detail line:

- Detail-level coupons always apply before order-level coupons.
- Next, the system checks the *Discount calc seq #*; the coupon with the lower sequence number applies first.
- Finally, if two coupons of the same type have the same sequence number, the first coupon alphanumerically, based on coupon code, applies first.
- If you are using *Customer Price Group Pricing*, the system applies order-level coupons after all other discounts and promotions are applied to the order; see *Order-Level Coupon Promotions when using Customer Price Group Pricing*.

Order entry vs. order maintenance: The system handles coupon entry and validation the same way in order maintenance in order entry; however:

- You cannot add any coupons to an order if any of the detail lines have printed pick slips, or are in closed (*X*) status.
- In order to apply coupon discounts in order maintenance:
- You must have the *Price Tables (E07)* system control value at the *Pricing Values (B31)* screen *selected*, or
- You must use *Customer Price Group Pricing*; see *Customer Price Group Pricing in Order Maintenance*.

What items are excluded from coupon discounts?

Restriction type	Detail-level coupons apply?	Order-level coupons apply?	Extended price included in Minimum order dollar total?
non-discountable item (the item's *Discountable* field is *selected*) when using a pricing method other than *Customer Price Group Pricing*	no	no	no
non-discountable item (the item's *Discountable* field is *selected*) when using *Customer Price Group Pricing*	yes	yes	yes
restricted item (as set up through the *Work with Coupon Item Restriction Screen*)	only dollar discounts apply; restricted from percentage discounts	only dollar discounts apply; the system displays a warning message if you enter a percentage discount and there is a restricted item on the order	yes

Coupon Setup

Overview: Use the *Working with Coupon Promotions (WCPR)* menu option to set up and maintain the following to support coupon promotions:

- *Identify the coupons available in your company:* Use the *Create Coupon Promotion Screen* to specify the date range, type of discount, and any restrictions or requirements for the coupon.
- *Require an offer?* Optionally, use the *Create Coupon Offer Requirement Screen* to specify that the coupon cannot be used unless the source code on the order header is associated with a specific offer, or one of a group of offers. The *Offer requirement* field for the coupon must be *selected*.
- *Require a source code?* Optionally, use the *Create Coupon Source Requirement Screen* to specify that the coupon cannot be used unless there is a specific source code, or one of a group of source codes, on the order header. The *Source requirement* field for the coupon must be *selected*.
- *Restrict two coupons from being used on the same order or item?* Optionally, use the *Create Coupon Restriction Screen* to specify two coupons that cannot be used together. This restriction can apply to both order-level and detail-level coupons, so that you will not be able to apply two restricted coupons to any two items on the same order. This setting would be useful if the two coupons together would result in a total discount that is greater than what you want to offer. The *Coupon restriction* field for both coupons should be *selected*. When you use the *Create Coupon Restriction Screen* to restrict the first coupon from the second, the system automatically creates a restriction for the second coupon against the first.
- *Require one or more specific items?* Optionally, use the *Create Coupon Item Requirement Screen* to specify item requirements. If you require more than one item for an order-level coupon, then all specified items must be on the order. You cannot specify more than one item for a detail-level coupon. In either case, the *Item requirement* field must be *selected*.

- *Make an item exempt from a coupon percentage discount?* Optionally, use the *Create Coupon Item Restriction Screen* to identify any items that are exempt from percentage discount coupons.

Additional setup:

- *Making an item non-discountable:* Set the *Discountable*field to *unselected* if the item should never have any type of discount applied to it. You will still be able to enter order-level coupons against this item in order entry or order maintenance, but no discounts will apply to the item, and its price will not be included in the order total for the purpose of determining whether the order qualifies for a *Minimum order $ amt*. **Note:** If you use *Customer Price Group Pricing*, the system includes non-discountable items in the coupon discount.
- *Updating order detail coupon statuses:* In order to update the Coupon status field in the Order Detail Coupon table (*OECPDC*) when you print a pick slip for the item or confirm the shipment, you must have the *Pick Sort Program Name (C65)* set to *FLR0217*. This program updates the coupon status to *G* when you print the pick slip, and to *R* when you confirm shipment of the pick slip.
- *Applying coupon discounts in order maintenance:* In order to apply coupon discounts in order maintenance:
- You must have the *Price Tables (E07)* system control value at the *Pricing Values (B31)* screen *selected*, or
- You must use *Customer Price Group Pricing*; see *Customer Price Group Pricing in Order Maintenance*.

> **Important:**
>
> In order for you to apply coupons to an order, the *Price method* for the source code on the order header must be set to *D* (regular plus reprice).

Coupon Examples

An Order-level Dollar Discount plus a Detail-level Percentage Discount

Example:

Items: An order has the following items:

- *AU123*, one unit at `$10.00`
- *CH456*, one unit at `$100.00`

Original merchandise total: `$110.00`

Coupons: Enter the following coupons against *CH456*:

- *10$O*, $10.00 off (order-level)
- *15%D*, 15% off (detail-level)
- Because *10$O* is an order-level coupon, entering it against a single item has the effect of applying it to all eligible order detail lines.
- The order-level dollar discount is not prorated across each eligible order detail line; instead, the dollar discount applies to the item with the highest unit price based on the Item Offer or SKU Offer record. As a result, no discount applies to item *AU123*.

Sequence: 15%D applies first, regardless of sequence number, because detail-level coupons always apply before order-level coupons.

Result:

Coupon *15%D* applies a discount of 15% to *CH456*: `$100.00 - $15.00 (15% of $100.00) = $85.00`

Coupon *10$O* applies a discount of $10.00 to *CH456*: `$85.00 - $10.00 = $75.00`

Discounted merchandise total:

- *AU123:* one unit at `$10.00`
- *CH456:* one unit at `$75.00`
- *Total* = `$85.00`

Variation with multiple units:
Items:

- *AU123*, one unit at `$10.00`
- *CH456*, three units at `$100.00 = $300.00`

Original merchandise total: `$310.00`

> **Note:**
>
> As above, no discount applies to item *AU123*.

Result:

Coupon *15%D* applies a 15% discount to *CH456*: `$100.00 - $15.00 (15% of $100.00) = $85.00`

Coupon *10$O* applies a total dollar discount of $10.00 to *CH456*: `$255.00 - $10.00 = $245.00, or 3 units at $81.67 each`

> **Note:**
>
> The total dollar discount applied for coupon *10$O* is actually $10.01 due to rounding.

Discounted merchandise total:

- *AU123:* one unit at `$10.00`
- *CH456:* three units at `$81.67 = $245.01`
- *Total* = `$255.01`

Variation with multiple units and quantity break price:
Items: The order has three units of item *CH456*, and this item has a break price of $90.00 for quantities of three or more.

Original merchandise total:

- *CH456:* three units at `$90 = $270.00`
- *AU123:* one unit at `$10.00`
- *Total* = `$280.00`

Coupons: Same as above.

Sequence: Same as above.

Result:

Coupon *15%D* applies a discount of 15% to *CH456*: `$90.00 – $13.50 (15% of $90.00) = $76.50`

Coupon *10$O* applies a total dollar discount of $10.00 to *CH456*: `$76.50 – $3.33 ($10.00 / quantity of 3) = $73.17`

As above, no discount applies to item *AU123*.

> **Note:**
>
> The total dollar discount applied for coupon *10$O* is actually $9.99 due to rounding.

Discounted merchandise total:

- *CH456:* three units at `$73.17 = $219.51`
- *AU123:* one unit at `$10.00`
- *Total* = `$229.51`

An Order-level Percentage Discount plus a Detail-level Dollar Discount

Example:

Items: An order has the following items:

- *AU123*, two units at `$10.00 = $20.00`
- *BA456*, one unit at `$10.00`

Original merchandise total: `$30.00`

Coupons: Enter the following coupons against *AU123*:

- *03$D*, $3.00 off (detail-level)
- *05%O*, 5% off (order-level)

> **Note:**
>
> Because *05%O* is an order-level coupon, entering it against a single item has the effect of applying it to all eligible order detail lines.

Sequence: 03$D applies first, regardless of sequence number, because detail-level coupons always apply before order-level coupons.

Result:

Coupon *03$D* applies a discount of $3.00 to *AU123*, and this $3.00 is prorated across the two units: `$10.00 - $1.50 ($3.00/2) = $8.50`

Coupon *05%O* applies a discount of 5% to *AU123*: `$8.50 - $.42 (5% of $8.50) = $8.08`

> **Note:**
>
> The total discount applied is actually `$.84`, not `$.85` (`5%` of the extended price of `$17.00`) due to rounding.

Coupon *05%O* applies a discount of 5% to *BA456*: `$10.00 - $.50 (5% of $10.00) = $9.50`

Discounted merchandise total:

- *AU123:* two units at `$8.08 = $16.16`
- *BA456:* one unit at `$9.50`
- *Total* = `$25.66`

Two Order-level Discounts

Example:

Items: An order has the following items:

- *AU123*, one unit at `$10.00`
- *CH456*, one unit at `$100.00`

Original merchandise total: `$110.00`

Coupons: Enter the following order-level coupons against any order detail line (because they are both order-level, entering them against any order detail line has the effect of applying them to all eligible order detail lines):

- *10$O*, $10.00 off any order
- *10%O50*, 10% off any order over $50.00

> **Note:**
>
> Each coupon has a Discount calculation sequence number of 5.

Sequence: 10$O applies first because it is first alphanumerically; both coupons have the same sequence number.

Result:

Coupon *10$O* applies the total order discount of $10.00 to item *CH456*, because it has the highest original unit price: `$100.00 - $10.00 = $90.00`

> **Note:**
>
> As in the first example, this order-level dollar discount applies to a single item only.

Coupon *10%O50* applies a 10% discount to item *CH456*: `$90.00 - $9.0 (10% of $90.00) = $81.00`

Coupon *10%O50* applies a 10% discount to item *AU123*: `$10.00 - $1.00 (10% of $10.00) = $9.00`

Discounted merchandise total:

- *AU123:* one unit at `$9.00`
- *CH456:* one unit at `$81.00`
- *Total* = `$90.00`

Variation with different sequence numbers (the percentage discount applies first):
Original merchandise total: `$110.00`

Result: If coupon *10%O50* has a lower sequence number than coupon *10$O*, then the above example would have the following results:

Coupon *10$O50* applies a 10% discount to item *AU123* as described above: `$10.00 - $1.00 (10% of $10.00) = $9.00`

Coupon *10%O50* applies a 10% discount to item *CH456*: `$100.00 - $10.00 (10% of $100.00) = $90.00`

Coupon *10$O* applies a $10.00 discount to item *CH456*: `$90.00 - $10.00 = $80.00`

Discounted merchandise total:

- *AU123:* one unit at `$9.00`
- *CH456:* one unit at `$80.00`
- *Total* = `$89.00`

An Order-level Percentage Discount with a Minimum Order Dollar Total and a Non-discountable Item

Example:

Items: An order has the following items:

- *AU123*, two units at `$10.00 = $20.00`
- *BA456*, three units at `$10.00 = $30.00`
- *MO789*, one unit at `$10.00`

Original merchandise total: `$60.00`

> **Note:**
>
> *MO789* is flagged as non-discountable in the Item table.

Coupon: Enter coupon *10%O50* with a 10% discount for a $50.00 minimum order total against item *MO789*.

> **Note:**
>
> Even though *MO789* is flagged as non-discountable, you can still enter order-level coupons against it; however, if you attempt to enter a detail-level coupon against a non-discountable item, the system displays an error message.

Result:

Coupon *10%O50* applies a discount of 10%, or $1.00 per unit, to *AU123* and *BA456*, for a total unit price of $9.00 for each. No discount applies to *MO789*, the non-discountable item.

Discounted merchandise total:

- *AU123:* two units at `$9.00 = $18.00`
- *BA456:* three units at `$9.00 = $27.00`
- *MO789:* one unit at `$10.00`
- *Total* = `$55.00`

Variation with promotional discount:
Original merchandise total: `$60.00`

The order is also eligible for a 10% promotional discount set up through *Working with Promotions (WPRO)*.

Result: After applying the coupon discount as described above, the system applies the 10% promotional discount to *AU123* and *BA456*, for a total unit price of $8.10 for each (`$9.00 - $.90 (10% of $9.00) = $8.10`). No discount applies to *MO789*, the non-discountable item.

> **Note:**
>
> The system still considers the order to have met the $50.00 minimum for the coupon, because the promotion discount applies after the coupon discount. However, the Order Detail Coupon records do not reflect the additional promotional discounts, only the coupon discount calculations.

Discounted merchandise total:

- *AU123:* two units at `$8.10 = $16.20`
- *BA456:* three units at `$8.10 = $24.30`
- *MO789:* one unit at `$10.00`

- *Total* = `$50.50`

Variation with lower order dollar total:
Items: If the order had the following items:

- *AU123*, two units at `$10.00 = $20.00`
- *BA456*, two units at `$10.00 = $20.00`
- *MO789*, one unit at `$10.00`

Original merchandise total: `$50.00`

Result: You would not be able to enter this coupon against the order; the non-discountable item, *MO789*, does not count toward the minimum order total of $50.00. However, the promotion still applies a 10% discount to the two discountable items, for a unit price of $9.00 (`$10.00 - 10%`).

Discounted merchandise total:

- *AU123:* two units at `$9.00 = $18.00`
- *BA456:* two units at `$9.00 = $18.00`
- *MO789:* one unit at `$10.00`
- *Total* = `$46.00`

An Order-level Item Requirement with Multiple Items

Example:

Items: An order has the following items:

- *CH456*, one unit at `$100.00`
- *AR789*, one unit at `$150.00`
- *AU123*, one unit at `$10.00`

Original merchandise total: `$260.00`

Coupon: Enter coupon *10%OIT* against any item. This order-level coupon has a discount of 10%, and has two item requirements specified: *CH456* and *AR789*.

Result:

Coupon *10%OIT* applies a discount of 10% to the two required items:

- *CH456*: `$100.00 - $10.00 (10% of $100.00) = $90.00`
- *AR789:* `$150.00 - $15.00 (10% of $150.00) = $135.00`

Item *AU123* is not discounted because it doesn't meet the item requirement.

Discounted merchandise total:

- *CH456:* one unit at `$90.00`
- *AR789:* one unit at `$135.00`
- *AU123:* one unit at `$10.00`
- *Total* = `$235.00`

Coupon Discount Processing

As you enter and accept orders, generate pick slips, and confirm shipments, the system updates the Order Detail Coupon table (OECPDC) along with other order-related tables. These updates are described below.

Applying the coupon discounts to the order: The setting of the *Automatically Reprice Coupon (K02)* system control value determines when the system applies the coupon discounts to the order.

- If *selected*, the system applies the coupon discounts and validates the order dollar minimum when you select *Accept* or *Exit* at the *Coupon Discount Window*, select *Reprice*, and when you accept the order.

The system updates the following fields in the Order Detail Coupon table:

- Pre-discount price = the unit price of the item before applying this particular coupon discount. The pre-discount price already reflects discounts such as quantity break price.
- Post-discount price = the unit price of the item after applying this particular discount. The post-discount price does not reflect any additional discounts, such as subsequent applicable coupons or a promotion discount.
- Coupon status = *P* (processed)
- Status change time = the time when you selected *Reprice* to calculate end-of-order pricing or selected *Accept* to accept the order
- If *unselected*, the system applies the coupon discounts and validates the order dollar minimum when you select *Reprice* and when you accept the order.

When you select *Accept* at the *Coupon Discount Window*, the system creates a record in the Order Detail Coupon table with the following values:

- Coupon status = *N* (new)
- Status change date = current system date
- Status change time = current system time

When you select *Reprice* and when you accept the order, the system updates the following fields in the Order Detail Coupon table:

- Pre-discount price = the unit price of the item before applying this particular coupon discount. The pre-discount price already reflects discounts such as quantity break price.
- Post-discount price = the unit price of the item after applying this particular discount. The post-discount price does not reflect any additional discounts, such as subsequent applicable coupons or a promotion discount.
- Coupon status = *P* (processed)
- Status change time = the time when you selected *Reprice* to calculate end-of-order pricing or selected *Accept* to accept the order

Determining the final discounts: The system will reprice the items after you accept the order by selecting *Accept*. For example, you might delete or cancel an item on the order, reducing the merchandise total below the minimum required for the coupon. However, the changes in price after you accept the order will not be visible and you will not be able to inform the customer of the repricing unless the *Display Order Recap (A75)* system control value is *selected*; in this case, you can review the repriced order totals at the Order Recap screen.

Generating pick slips: When you print a pick slip for an order detail line, the system sets the Order Detail Coupon status to *G* (pick slip generated) only if you have the *Pick Sort Program Name (C65)* system control value set to *FLR2017*. The status change date and time are also updated.

Billing: When you confirm shipment, the system sets the Order Detail Coupon status to *R* (redeemed) if the status was previously set to *G* at pick slip generation. The status change date and time are also updated. However, if you do not have the *Pick Sort Program Name (C65)* system control value set to *FLR2017*, the coupon status will not be reset at billing.

Tracking demand: The system posts the net, discounted price to demand-tracking tables.

Example:

An order includes the item *AU123*. The regular Item Offer price is $10.00, but a coupon discount of $3.00 applies for a net price of $7.00. When you enter the order, the system posts $7.00 to demand-tracking tables such as the Order Billing History table.

Work with Coupon Promotion Screen

Purpose: Use this screen to review and work with the coupons you use to apply percentage or dollar discounts to orders, or items on orders.

How to display this screen: Enter *WCPR* in the Fast path field at the top of any menu, or select Work with Coupon Promotions from a menu.

Field	Description
Coupon code	The code associated with the coupon promotion discount. Alphanumeric, 6 positions; optional.
Coupon description	The description of the coupon, truncated from 45 positions. Alphanumeric, 35 positions; display-only.
Coupon type	Indicates whether this is an order-level or detail-level coupon: • *Order Level* = order-level coupon: applies to all applicable items on the order • *Detail Level* = detail-level coupon: applies only to a specific item on the order Alphanumeric, optional.
Calculation seq #	Indicates the sequence in which to apply this coupon compared with other coupons for the same order or order detail line. Coupons with lower sequence numbers apply first. The system uses all of the following information when determining the sequence in which to apply coupons: • Detail-level coupons always apply before order-level coupons. • Next, the system checks this sequence number. The coupon with the lower sequence number applies first. • Finally, if two coupons have the same sequence number, the first coupon alphanumerically, based on the coupon code, applies first. Numeric, 5 positions; display-only.

Field	Description
Src req (Source requirement)	Indicates whether you can apply this coupon only to orders using a required source code, or one source from a list of required source codes. You use the *Work with Coupon Source Requirement Screen* to review or work with source requirements for a coupon.
Ofr req (Offer requirement)	Indicates whether you can apply this coupon only to orders using a required offer, or one offer from a list of required offers. You use the *Work with Coupon Offer Requirement Screen* to review or work with offer requirements for a coupon.
Cpn Res (Coupon restriction)	Indicates whether this coupon is restricted from use with another coupon on the same order or order detail line. You use the *Work with Coupon Restriction Screen* to review or work with coupon restrictions for a coupon.
Itm Req (Item requirement)	Indicates whether you can apply this coupon only to: • orders that include a required item or items (order-level coupons); in this case, the coupon discount applies only to the required item(s) • order detail lines for a required item (detail-level coupons) You use the *Work with Coupon Item Requirement Screen* to review or work with item requirements for a coupon.

Option	Procedure
Create a new coupon	Select *Create* to advance to the Create Coupon Promotion Screen.
Change an existing coupon	Select *Change* for a coupon to advance to the Change Coupon Promotion screen. Use this screen to change an existing coupon promotion. See *Create Coupon Promotion Screen* for more information and field descriptions.
Delete a coupon	Select *Delete* for a coupon.
Display a coupon	Select *Display* for a coupon to advance to the Display Coupon Promotion screen. Use this screen to review an existing coupon promotion. See *Create Coupon Promotion Screen* for more information and field descriptions.
Work with offer requirements for a coupon	Select *Offer requirement* for a coupon to advance to the *Work with Coupon Offer Requirement Screen*.
Work with source code requirements for a coupon	Select *Source requirement* for a coupon to advance to the *Work with Coupon Source Requirement Screen*.
Work with coupon restrictions for a coupon	Select *Coupon restriction* for a coupon to advance to the *Work with Coupon Restriction Screen*.
Work with item requirements for a coupon	Select *Item requirement* for a coupon to advance to the *Work with Coupon Item Requirement Screen*.
Work with item restrictions	Select *Item restriction* to advance to the *Work with Coupon Item Restriction Screen*.

Create Coupon Promotion Screen

Purpose: Use this screen to create a new coupon for a dollar or percentage discount.

How to display this screen: Select *Create* at the Work with Coupon Promotion Screen.

Field	Description
Coupon code	The code associated with the coupon promotion discount. This is the code that you enter at the *Coupon Discount Window* in order entry. Alphanumeric, 6 positions; required.
Coupon description	The description of the coupon. This is the description that displays at the *Coupon Discount Window* in order entry. Alphanumeric, 45 positions; required.
Coupon type	Indicates whether this is an order-level or detail-level coupon: • *Order Level* = order-level coupon: applies to all applicable items on the order • *Detail Level* = detail-level coupon: applies only to a specific item on the order Alphanumeric, required.
Discount calc seq #	Indicates the sequence in which to apply this coupon compared with other coupons for the same order or order detail line. Coupons with lower sequence numbers apply first. The system uses all of the following information when determining the sequence in which to apply coupons: • Detail-level coupons always apply before order-level coupons. • Next, the system checks this sequence number. The coupon with the lower sequence number applies first. • Finally, if two coupons have the same sequence number, the first coupon alphanumerically, based on the coupon code, applies first. Numeric, 5 positions; required.
Campaign	For informational and reporting use only. Alphanumeric, 5 positions; optional.
Start date	The first date when the coupon can be applied to orders. The Start date cannot be later than the End date. If the current date is not within the Start date and the End date, you will not be able to apply the coupon in order entry; instead, the Coupon Discount window displays an error message: `Coupon is not currently active.` Numeric, 6 positions; required.
End date	The last date when the coupon can be applied to orders. The End date cannot be earlier than the Start date. If the current date is not within the Start date and the End date, you will not be able to apply the coupon in order entry; instead, the Coupon Discount window: displays an error message: `Coupon is not currently active.` Numeric, 6 positions; required.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Source requirement</td><td>Indicates whether you can apply this coupon to orders only if they use a required source code, or one source from a list of required source codes. Valid values are:
Selected = This coupon can be applied to an order only if the source code on the order header is specified through the Work with Coupon Source Requirement Screen
Unselected = This coupon does not have a source code requirement</td></tr>
<tr><td>Vendor #</td><td>The vendor associated with the coupon. For informational and reporting purposes only.
Numeric, 7 positions; optional.</td></tr>
<tr><td>Offer requirement</td><td>Indicates whether you can apply this coupon to orders only if they use a required offer, or one offer from a list of required offers.
Valid values are:
Selected = This coupon can be applied to an order only if the source code on the order header points to an offer specified through the Work with Coupon Offer Requirement Screen
Unselected = This coupon does not have an offer requirement</td></tr>
<tr><td>Group ID</td><td>For informational and reporting purposes only.
Alphanumeric, 3 positions; optional.</td></tr>
<tr><td>Coupon restriction</td><td>Indicates whether this coupon is restricted from use on the same order or detail line as another coupon.
Valid values are:
Selected = This coupon cannot be used on the same order (order-level coupon) or order detail line (detail-level coupon) as another coupon, specified through the Work with Coupon Restriction Screen
Unselected = This coupon does not have a coupon restriction
When you create a restriction for COUPA against COUPB, the system automatically creates a restriction for COUPA against COUPB. The system will not allow you to apply both coupons against the same order or detail line.</td></tr>
<tr><td>Coupon analysis unit</td><td>For informational and reporting purposes only.
Alphanumeric, 6 positions; optional.</td></tr>
</table>

Field	Description
Item requirement	Indicates whether you can apply this coupon to orders only if they include one or more required items. Valid values are: • *Selected* = This coupon can be applied only if: • *order-level coupons*: the order includes all the items specified through the Work with Coupon Item Requirement Screen; in this case, the coupon discount applies only to the required item(s) • *detail-level coupons*: the order detail line is for the item specified through the Work with Coupon Item Requirement Screen **Note:** You can specify only one item requirement for detail-level coupons. 1. *Unselected* = This coupon does not have an item requirement
Minimum detail $ amt	Indicates the minimum single-unit price required for an order detail line to qualify for the coupon. You can specify a minimum detail dollar amount for detail-level coupons only; if you try to specify this amount for an order-level coupon, the system displays an error message: `Minimum detail $ amt only applies to detail level coupons.` See How an Order or Item Qualifies for a Coupon for more information on how the system evaluates minimum dollar requirements. Numeric, 13 positions with a two-place decimal; optional.
Minimum order $ amt	Indicates the minimum total merchandise value required for an order to qualify for the coupon. This qualifying total does not include the price of any non-discountable items. You can specify a minimum order dollar amount for order-level coupons only; if you try to specify this amount for an detail-level coupon, the system displays an error message: `Minimum order $ amt only applies to order level coupons.` See *How an Order or Item Qualifies for a Coupon* for more information on how the system evaluates minimum dollar requirements. Numeric, 13 positions with a two-place decimal; optional.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Dollar discount</td><td>Indicates the dollar discount to apply as follows:
order-level coupons: the dollar discount applies to the item with the highest unit price, reducing the total merchandise value on the order.

Note:
If you cancel this item, the system moves the discount to the item with the next highest single-unit price if the order is still eligible for the coupon.
detail-level coupons: the total dollar discount applies to the extended price of the order detail line.
Prorating against multiple units: The dollar discount is prorated if the order detail line has a quantity of more than one unit. In this situation, there may be a slight discrepancy against the total dollar discount due to rounding. For example, if the total dollar discount is $1.00, and it is prorated against 3 units, the total discount for each unit is actually $.33, or $.99 total for the line.

See How Coupons Work and Coupon Examples for more information.

You cannot enter both a dollar discount and a percentage discount, or the system displays an error message:
<code>Either dollar or percentage discount required.</code>

Numeric, 13 positions with a two-place decimal; required if you do not specify a percentage discount.</td></tr>
<tr><td>Percentage discount</td><td>Indicates the percentage discount to apply as follows:
order-level coupons: the percentage discount applies to each order detail line that is not a restricted item (through the Work with Coupon Item Restriction Screen) or a non-discountable item
detail-level coupons: the percentage discount that applies to the unit price of the order detail line.
See How Coupons Work and Coupon Examples for more information.

You cannot enter both a dollar discount and a percentage discount or the system displays an error message:
<code>Either dollar or percentage discount required.</code>

Numeric, 7 positions with a two-place decimal; required if you do not specify a dollar discount.</td></tr>
</table>

Work with Coupon Offer Requirement Screen

Purpose: Use this screen to review and work with the offers that are required for an order to qualify for a coupon:

- *If you specify a single offer:* the source code on the order header must point to this offer
- *If you specify more than one offer:* the source code on the order header must point to one of the offers specified

Otherwise, the system displays an error message when you enter the coupon:

```
Coupon cannot be used with existing offer.
```

You cannot advance to this screen for a coupon that does not have an offer requirement, based on the *Offer requirement* field; instead, the system displays an error message:

```
No offer requirement for this coupon.
```

How to display this screen: Select *Offer requirement* for a coupon at the Work with Coupon Promotion Screen.

Field	Description
Coupon code	The coupon code with the offer requirement. Alphanumeric, 6 positions; display-only.
Coupon description	The description of the coupon. Alphanumeric, 45 positions; display-only.
Offer	The required offer. Alphanumeric, 3 positions; optional.
Offer description	The description of the required offer. Alphanumeric, 30 positions; display-only.

Option	Procedure
Create a coupon offer requirement	Select *Create* to advance to the *Create Coupon Offer Requirement Screen*.
Delete a coupon offer requirement	Select *Delete* for a coupon offer restriction to delete it.

Create Coupon Offer Requirement Screen

Purpose: Use this screen to specify an offer requirement for a coupon:

- *If you specify a single offer:* the source code on the order header must point to this offer
- *If you specify more than one offer:* the source code on the order header must point to one of the offers specified

Otherwise, the system displays an error message when you enter the coupon:

```
Coupon cannot be used with existing offer.
```

How to display this screen: Select *Create* at the Work with Coupon Offer Requirement Screen.

Completing this screen: Enter the offer that will be required to apply the coupon. Offers are defined in and validated against the Offer table; see *Working with Offers (WOFR)* for more information.

If the offer requirement already exists for the coupon, the system displays an error message:

```
Coupon Offer Requirement already exists.
```

Work with Coupon Source Requirement Screen

Purpose: Use this screen to review and work with the source code requirement(s) for a coupon:

- *If you specify a single source code:* this must be the source code on the order header
- *If you specify more than one source code:* the source code on the order header must be one of the source codes specified

Otherwise, the system displays an error message when you enter the coupon:

```
Coupon cannot be used with existing source.
```

You cannot advance to this screen for a coupon that does not have a source code requirement, based on the *Source requirement* field; instead, the system displays an error message:

```
No source requirement for this coupon.
```

How to display this screen: Select *Source requirement* for a coupon at the Work with Coupon Promotion Screen.

Field	Description
Coupon code	The coupon code with the source code requirement. Alphanumeric, 6 positions; display-only.
Coupon description	The description of the coupon. Alphanumeric, 45 positions; display-only.
Source	The required source code. Alphanumeric, 7 positions; optional.
Source description	The description of the required source code. Alphanumeric, 30 positions; display-only.

Option	Procedure
Create a coupon source requirement	Select *Create* to advance to the *Create Coupon Source Requirement Screen*.
Delete a coupon source requirement	Select *Delete* for a coupon source restriction to delete it.

Create Coupon Source Requirement Screen

Purpose: Use this screen to specify a source code requirement for a coupon:

- *If you specify a single source code:* this must be the source code on the order header
- I*f you specify more than one source code:* the source code on the order header must be one of the source codes specified

Otherwise, the system displays an error message when you enter the coupon:

```
Coupon cannot be used with existing source.
```

How to display this screen: Select *Create* at the Work with Coupon Source Requirement Screen.

Completing this screen: Enter the source code that will be required to apply the coupon. Source codes are defined in and validated against the Source Code table; see *Working with Source Codes (WSRC)* for more information.

If the source code requirement already exists for the coupon, the system displays an error message:

```
Coupon Source Requirement already exists.
```

Work with Coupon Restriction Screen

Purpose: Use this screen to review or work with the other coupons that are restricted from use with this coupon. Regardless of whether the coupons are order-level or detail-level, the system does not permit you to enter the two restricted coupons on the same order, even on separate order detail lines.

Coupon restrictions are reciprocal: The system creates coupon restrictions reciprocally. For example, when you create a coupon restriction for *COUPA* against *COUPB*, the system automatically creates a coupon restriction for *COUPB* against *COUPA*. If you try to enter *COUPA* on the same order as *COUPB*, or vice versa, the system displays an error message:

```
Coupon may not be used with a conflicting coupon.
```

You cannot advance to this screen for a coupon that does not the *Coupon restriction* field *selected*; instead, the system displays an error message:

```
No coupon restriction for this coupon.
```

How to display this screen: Select *Coupon restriction* for a coupon at the Work with Coupon Promotion Screen.

Field	Description
Coupon code	The coupon code with the coupon restriction. Alphanumeric, 6 positions; display-only.
Coupon description	The description of the coupon. Alphanumeric, 45 positions; display-only.
Restricted coupon code	The coupon that is restricted against use with this coupon. Alphanumeric, 6 positions; optional.
Restricted coupon description	The description of the restricted coupon. Alphanumeric, 45 positions; display-only.

Option	Procedure
Create a coupon restriction	Select *Create* to advance to the *Create Coupon Restriction Screen*.
Delete a coupon restriction	Select *Delete* for a coupon restriction to delete it.

Create Coupon Restriction Screen

Purpose: Use this screen to restrict this coupon from use on the same order with another coupon.

Coupon restrictions are reciprocal: The system creates coupon restrictions reciprocally, and the restriction works only as long as you do not remove the restriction for one coupon or another. For example, when you create a coupon restriction for *COUPA* against *COUPB*, the system automatically creates a coupon restriction for *COUPB* against *COUPA*. If you try to enter *COUPA* on the same order or detail line as *COUPB*, or vice versa, the system displays an error message:

```
Coupon may not be used with a conflicting coupon.
```

How to display this screen: Select *Create* at the Work with Coupon Restriction Screen.

Completing this screen: Enter the coupon code to restrict from use with the current coupon. The system creates a restriction for the current coupon against the entered coupon, and for the entered coupon against the current coupon. If the coupon restriction already exists, the system displays an error message:

```
Coupon Restriction already exists.
```

Work with Coupon Item Requirement Screen

Purpose: Use this screen to review and work with the item requirement(s) for a coupon:

- *If you specify a single item:*
- order-level coupons: the item must be included on the order; in this case, the coupon discount applies only to the required item
- detail-level coupons: the item must be on the selected order detail line
- *If you specify more than one item:*
- order-level coupons: all of the items must be on the order; in this case, the coupon discount applies only to the required items
- detail-level coupons: you cannot specify more than one item

If the order or detail line does not meet the item requirement(s), the system displays an error message when you enter the coupon:

```
Coupon item requirement(s) have not been met.
```

You cannot advance to this screen for a coupon that does not have an item requirement, based on the *Item requirement* field; instead, the system displays an error message:

```
No item requirement for this coupon.
```

How to display this screen: Select *Item requirement* for a coupon at the Work with Coupon Promotion Screen.

Field	Description
Coupon code	The coupon code with the item requirement. Alphanumeric, 6 positions; display-only.
Coupon description	The description of the coupon. Alphanumeric, 45 positions; display-only.

Field	Description
Item	The required item. Alphanumeric, 12 positions; optional.
SKU	The item's unique characteristics, such as its color or size. **Note:** If you leave the SKU field blank for a SKU'd item, the coupon applies to any SKU for the item. Alphanumeric, three 4-position fields; optional.
Description	The description of the SKU (SKU'd item) or the item (non-SKU'd item). Alphanumeric, 120 positions (item) or 40 positions (SKU); display-only.

Option	Procedure
Create an item requirement	Select *Create* to advance to the *Create Coupon Item Requirement Screen*.
Delete an item requirement	Select *Delete* for an item requirement to delete it.

Create Coupon Item Requirement Screen

Purpose: Use this screen to create an item requirement:

- *If you specify a single item:*
- order-level coupons: the item must be included on the order; in this case, the coupon discount applies only to the required item
- detail-level coupons: the item must be on the selected order detail line
- *If you specify more than one item:*
- order-level coupons: all of the items must be on the order; in this case, the coupon discount applies only to the required items
- detail-level coupons: you cannot specify more than one item

If the order or detail line does not meet the item requirement(s), the system displays an error message when you enter the coupon:

```
Coupon item requirement(s) have not been met.
```

How to display this screen: Select *Create* at the Work with Coupon Item Requirement Screen.

Completing this screen: Enter the code representing the item that should be required for the coupon. If the item is SKU'd, you can enter the SKU information to restrict the coupon to that specific SKU; or, you can leave the SKU information blank so that all SKUs are eligible for the coupon.

If you try to create more than one item requirement for a detail-level coupon, the system displays an error message:

```
Only 1 item requirement allowed for detail level coupon.
```

If you enter an item that already has an item requirement for the coupon, the system displays an error message:

```
Coupon Item already exists.
```

Work with Coupon Item Restriction Screen

Purpose: Use this screen to review or work with items that are restricted from percentage coupon discounts under the following conditions:

- *order-level coupons:* the discount does not apply to the restricted item; however, the restricted item price is included in the order total for the purposes of evaluating the *Minimum order $ amt*. When you apply an order-level percentage coupon to an order with a restricted item, the system displays an error message: `At least one item is restricted from this coupon.` If all of the items on the order are restricted, the system displays an error message: `% discount not allowed.`
- *detail-level coupons:* you cannot apply a coupon to the restricted item; instead, the system displays an error message: `% discount not allowed.` However, you can apply a detail-level dollar discount to a restricted item.

How to display this screen: Select *Item restriction* at the Work with Coupon Promotion Screen.

Field	Description
Item	The item that is restricted from percentage discount. Alphanumeric, 12 positions; optional.
SKU	The item's unique characteristics, such as its color or style. **Note:** If the item has SKUs, but the base item displays here without any SKU information, then all SKUs of the item are restricted from percentage discounts. Alphanumeric, three 4-position fields; optional.
Description	The description of the SKU (SKU'd item) or item (non-SKU'd item). Alphanumeric, 45 positions; display-only.

Option	Procedure
Create an item restriction	Select *Create* to advance to the *Create Coupon Item Restriction Screen*.
Delete an item restriction	Select *Delete* for an item restriction to delete it.

Create Coupon Item Restriction Screen

Purpose: Use this screen to specify items that are restricted from percentage coupon discounts under the following conditions:

- *order-level coupons:* the discount does not apply to the restricted item; however, the restricted item price is included in the order total for the purposes of evaluating the *Minimum order $ amt*. When you apply an order-level percentage coupon to an order with a restricted item, the system displays an error message: `At least one item is restricted from this coupon.` If all of the items on the order are restricted, the system displays an error message: `% discount not allowed.`
- *detail-level coupons:* you cannot apply a coupon to the restricted item; instead, the system displays an error message: `% discount not allowed.` However, you can apply a detail-level dollar discount to a restricted item.

How to display this screen: Select *Create* at the Work with Coupon Item Restriction Screen.

Completing this screen: Enter the item and, optionally, the SKU to restrict from percentage discounts. If the item has SKUs and you do not enter any SKU information, then all SKUs of the item will be restricted as described above.

If you enter an item that already has a restriction, the system displays an error message:

`Coupon Item Restriction already exists.`

Working with Customer Price Groups (WCPG)

Purpose: Use the Work with Customer Price Groups menu option to create and work with customer price groups. Customer price groups are used:

- during quantity price matrix pricing, defined through the *Working with Quantity Price Matrix (WQPM)* menu option.
- during *Customer Price Group Pricing*.
- as a qualifier for a discount promotion; see *Working with Promotions (WPRO)*.

Assigning the customer price group: You can assign a sold to customer to a customer price group at the *Second Create Customer Sold To Screen*. Also, you can pass the price group code in the *Inbound Order XML Message (CWORDERIN)* or the *Inbound Customer Message (CWCustomerIn)*. When you assign the customer price group through the order API, the new order is eligible for any pricing or promotions associated with the price group. If you create an order for a customer that is not assigned to a customer price group, or is assigned to an invalid customer price group code, the system assigns the customer price group code defined in the *Customer Price Group Code for CPG Pricing Only (L58)* system control value to the customer.

Included in customer search response: Information on the customer's price group is included in the generic customer search response XML message. See *Generic Customer Inquiry (Search) API* for more information.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

In this topic:

- *Work with Customer Price Groups Screen*
- *Create Customer Price Group Screen*
- *Work with Customer Price Group Details Screen*
- *Create Customer Price Group Detail Screen*
- *Work with Customer Price Group Exclusions Screen*
- *Create Customer Price Group Exclusions Screen*

Work with Customer Price Groups Screen

Use this screen to create and work with customer price groups.

How to display this screen: Enter *WCPG* in the Fast path field or select Work with Customer Price Group from a menu.

Column sort: You can sort on any column on this screen by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Customer price groups first display on this screen in alphanumeric price code sequence.

Field	Description
Price Group	A code that represents a customer price group. Enter a full or partial customer price group code to display customer price groups in alphanumeric order, beginning with your entry. Alphanumeric, 4 positions; Optional.
Description	A description of the customer price group. Enter a full or partial price group description to display customer price groups that contain your entry. Alphanumeric, 30 positions; Optional.
Price Type	Defines the price the system uses as the initial price of an item during customer price group line level pricing. Valid values: • *Original* (O) = Original Price. The system uses the price defined in the *Orig retail $* (Original retail price) field in the SKU table as the initial price of the item. • *Regular* (R) = Regular Price. The system uses the price defined in the *List price* field in the SKU table as the initial price of the item. Select a valid price type to display customer price groups that match your entry. **Note:** This field displays only if a customer price group code has been defined in the *Customer Price Group Code for CPG Pricing Only (L58)* system control value. Optional.

Field	Description
Discount	The percentage off the initial price for this customer price group. For example, *10* means the customer price group qualifies for a 10% discount. *0* indicates no discount for the customer price group. You can also define a percent discount for the customer price group at the customer price group detail level. When determining the customer price group discount, the system uses the discount defined at the customer price group detail level if its effective date qualifies; otherwise, if the effective date does not qualify or if a discount is not defined at the customer price group detail level, the system uses the discount defined at the customer price group header level. Enter a discount to display customer price groups whose discount starts with your entry. • This field displays only if a customer price group code has been defined in the *Customer Price Group Code for CPG Pricing Only (L58)* system control value. • The system applies the customer price group discount to the lines on an order during *Line Level Customer Price Group Pricing*; however, if the order line is assigned to a price code during *Customer Price Group Price Code Pricing*, the order line no longer qualifies for the customer price group discount. Numeric, 5 positions with a 2-place decimal; optional.
Best Price Comparison	Defines whether the system performs customer price group best price comparison logic for the customer price group during end-of-order pricing and repricing. Customer price group best price comparison determines if the price available for the customer price group defined in the Customer Price Group Code for CPG Pricing Only (L58) system control value is a better price than the price available for the customer price group assigned to the sold to customer. Whichever customer price group provides the best price, the system applies this price to the items on the order. Valid values: • *Yes* = The system performs customer price group best price comparison logic for this customer price group. • *No* (default) = The system does not perform customer price group best price comparison logic for this customer price group. Select *Yes* or *No* to display customer price groups whose best price comparison setting matches your entry. **Note:** This field displays only if a customer price group code has been defined in the *Customer Price Group Code for CPG Pricing Only (L58)* system control value. Optional.

Screen Option	Procedure
Create a customer price group	Select *Create* to advance to the Create Customer Price Group Screen.
Change a customer price group	In the Action field, select *Change* for a customer price group to advance to the Change Customer Price Group screen. See the *Create Customer Price Group Screen* for field descriptions.
Delete a customer price group	In the Action field, select *Delete* for a customer price group to advance to the Confirm Delete window. Select *Yes* to confirm the delete; otherwise, select *No* to cancel the delete. When you delete a customer price group, the system deletes any associated details and exclusions defined for the customer price group. • The system allows you to delete a customer price group that is assigned to a promotion. • You cannot delete a customer price group that is assigned to a customer. • You cannot delete the customer price group defined in the *Customer Price Group Code for CPG Pricing Only (L58)* system control value.
Work with the details of a customer price group	In the Action field, select *Details* for a customer price group to advance to the Work with Customer Price Group Details Screen. **Note:** This option is available only if a customer price group code has been defined in the *Customer Price Group Code for CPG Pricing Only (L58)* system control value.
Review the promotions defined in the WPRO menu option that use the customer price group as a qualifier for the promotion	In the Action field, select *Promotions* for a customer price group to advance to the Display Customer Price Group Promotions Screen.
Work with the exclusions of a customer price group	In the Action field, select *Exclusions* for a customer price group to advance to the Work with Customer Price Group Exclusions Screen. **Note:** This option is available only if a customer price group code has been defined in the *Customer Price Group Code for CPG Pricing Only (L58)* system control value.

Create Customer Price Group Screen

Purpose: Use this screen to create a customer price group.

How to display this screen: Select *Create* at the *Work with Customer Price Groups Screen*.

Field	Description
Price Group	A code that represents a customer price group. Alphanumeric, 4 positions. Create: required. Change: display-only.
Description	The description of the customer price group. Alphanumeric, 30 positions; required.
Price Type	Used for customer price group pricing only. Defines the price the system uses as the initial price of an item during customer price group line level pricing. Valid values: • *Original* (O) = Original Price. The system uses the price defined in the *Orig retail $* (SKU original retail price) field in the SKU table as the initial price of the item. • *Regular* (R) = Regular Price. The system uses the price defined in the *List price* field in the SKU table as the initial price of the item. **Note:** This field displays only if a customer price group code has been defined in the *Customer Price Group Code for CPG Pricing Only (L58)* system control value. Required.
Discount	The percentage off the initial price for this customer price group. For example, *10* means the customer price group qualifies for a 10% discount. *0* indicates no discount for the customer price group. You can also define a percent discount for the customer price group at the customer price group detail level. When determining the customer price group discount, the system: 1. Uses the discount defined in the Customer Price Group Detail table with an effective date that is equal to or earlier than the current date. If more than one Customer Price Group Detail record exists with a qualifying effective date, the system uses the discount with the most current effective date. 2. If a discount is not defined in the Customer Price Group Detail table with a qualifying effective date, uses the discount defined in the Customer Price Group table. • This field displays only if a customer price group code has been defined in the *Customer Price Group Code for CPG Pricing Only (L58)* system control value. • The system applies the customer price group discount to the lines on an order during *Line Level Customer Price Group Pricing*; however, if the order line is assigned to a price code during *Customer Price Group Price Code Pricing*, the order line no longer qualifies for the customer price group discount. Numeric, 5 positions with a 2-place decimal; optional.

Field	Description
Best Price Comparison	Defines whether the system performs customer price group best price comparison logic for the customer price group during end-of-order pricing and repricing. Customer price group best price comparison determines if the price available for the customer price group defined in the Customer Price Group Code for CPG Pricing Only (L58) system control value is a better price than the price available for the customer price group assigned to the sold to customer. Whichever customer price group provides the best price, the system applies this price to the item on the order. Valid values: • *Yes* = The system performs customer price group best price comparison logic for this customer price group. See *Customer Price Group Best Price Comparison* for more information. • *No* (default) = The system does not perform customer price group best price comparison logic for this customer price group. **Note:** This field displays only if a customer price group code has been defined in the *Customer Price Group Code for CPG Pricing Only (L58)* system control value. Optional.

Work with Customer Price Group Details Screen

Purpose: Use this screen to work with the additional discounts defined for a customer price group. The system applies the customer price group discount to an order during customer price group line level pricing. If a discount is not defined at the customer price group detail level, the system uses the discount defined at the customer price group header level, if any.

How to display this screen: Select *Details* for an existing customer price group at the *Work with Customer Price Groups Screen*.

> **Note:**
>
> This screen is available only if a customer price group code has been defined in the *Customer Price Group Code for CPG Pricing Only (L58)* system control value.

Customer price group details display on this screen in ascending effective date sequence.

Field	Description
Price Group	The code and description of the customer price group. Code: Alphanumeric, 4 positions; display-only.
Description	The description of the customer price group. Description: Alphanumeric, 30 positions; display-only.

Field	Description
Effective Date	The date when the customer price group detail discount becomes effective. You cannot have more than one customer price group detail with the same effective date. Enter a valid date to display customer price group details whose effective date is equal to or later than your entry. Numeric, 6 positions (in user date format); Optional.
Discount	The percentage off the initial price for this customer price group. For example, *10* means the customer price group qualifies for a 10% discount. *0* indicates no discount for the customer price group. You can also define a percent discount for the customer price group at the customer price group detail level. When determining the customer price group discount, the system: 1. Uses the discount defined in the Customer Price Group Detail table with an effective date that is equal to or earlier than the current date. If more than one Customer Price Group Detail record exists with a qualifying effective date, the system uses the discount with the most current effective date. 2. If a discount is not defined in the Customer Price Group Detail table with a qualifying effective date, uses the discount defined in the Customer Price Group table. • **Note:** The system applies the customer price group discount to the lines on an order during *Line Level Customer Price Group Pricing*; however, if the order line is assigned to a price code during *Customer Price Group Price Code Pricing*the order line no longer qualifies for the customer price group discount. Enter a discount and select *Search* to display customer price group details that match your entry. Numeric, 5 positions with a 2-place decimal; Optional.

Screen Option	Procedure
Create a customer price group detail	Select *Create* to advance to the *Create Customer Price Group Detail Screen*.
Delete a customer price group detail	In the Action field, select *Delete* for a customer price group detail to advance to the Confirm Delete window. Select *Yes* to confirm the delete; otherwise, select *No* to cancel the delete.
Work with the exclusions of a customer price group	In the Action field, select *Exclusions* for a customer price group to advance to the *Work with Customer Price Group Exclusions Screen*.

Create Customer Price Group Detail Screen

Purpose: Use this screen to create a discount for a customer price group.

How to display this screen: Select *Create* on the *Work with Customer Price Group Details Screen*.

Field	Description
Price Group	The code and description of the customer price group. Code: Alphanumeric, 4 positions; display-only.
Description	The description of the customer price group. Description: Alphanumeric, 30 positions; display-only.
Effective Date	The date when the customer price group detail discount becomes effective. You cannot have more than one customer price group detail with the same effective date. Numeric, 6 positions (in user date format); Required.
Discount	The percentage off the initial price for this customer price group. For example, *10* means the customer price group qualifies for a 10% discount. *0* indicates no discount for the customer price group. You can also define a percent discount for the customer price group at the customer price group detail level. When determining the customer price group discount, the system: 1. Uses the discount defined in the Customer Price Group Detail table with an effective date that is equal to or earlier than the current date. If more than one Customer Price Group Detail record exists with a qualifying effective date, the system uses the discount with the most current effective date. 2. If a discount is not defined in the Customer Price Group Detail table with a qualifying effective date, uses the discount defined in the Customer Price Group table. **Note:** The system applies the customer price group discount to the lines on an order during *Line Level Customer Price Group Pricing*; however, if the order line is assigned to a price code during *Customer Price Group Price Code Pricing*, the order line no longer qualifies for the customer price group discount. Numeric, 5 positions with a 2-place decimal; Required.

Work with Customer Price Group Exclusions Screen

Purpose: Use this screen to define the items/SKUs that are not eligible for the customer price group discount applied to an order during customer price group pricing.

If an item contains SKUs, you can exclude all SKUs for the item or indicate the specific SKUs you wish to exclude from the customer price group discount.

CPG Exclusion upload: The *Customer Price Group SKU Exclusion Upload Table* allows you to upload CPG exclusion information from an external system. Use the *Customer Price Group SKU Exclusion Upload Process* to create and update records in the Customer Price Group SKU Exclusion table. See *Customer Price Group SKU Exclusion Upload* for more information.

> **Important:**
>
> Items/SKUs that are excluded from the customer price group discount, ALWAYS use the *List price* field in the SKU table as the initial price of the item, regardless of the setting of the *Price Type* field for the customer price group.

How to display this screen: Select *Exclusions* at the *Work with Customer Price Groups Screen* or *Work with Customer Price Group Details Screen*.

> **Note:**
>
> This screen is available only if a customer price group code has been defined in the *Customer Price Group Code for CPG Pricing Only (L58)* system control value.

Customer price group exclusions display on this screen in ascending item number, SKU code sequence.

Field	Description
Price Group	The code of the customer price group. Code: Alphanumeric, 4 positions; display-only.
Description	The description of the customer price group. Description: Alphanumeric, 30 positions; display-only.
Item	A code for the item you wish to exclude from the customer price group discount. Item codes are defined in and validated against the Item table. You can prompt on this field to advance to the Select Item/SKU window. This window displays the first 500 item/SKU records; use the search fields to refine your search results. Enter a full or partial item code to display customer price group exclusions whose item code contains your entry. Alphanumeric, 12 positions; Optional.
SKU	The SKU of the item you wish to exclude from the customer price group discount. 1. If the item contains SKUs and you leave this field blank, all SKUs of the item are excluded from the customer price group discount. 2. If the item contains SKUs and you specify a SKU in this field, only the SKU specified is excluded from the customer price group discount. You can prompt on this field to advance to the Select Item/SKU window. This window displays the first 500 item/SKU records; use the search fields to refine your search results. Enter a full or partial SKU code to display customer price group exclusions whose SKU code contains your entry. Alphanumeric, three 4-position fields; Optional.

o

Screen Option	Procedure
Create a customer price group exclusion	Select *Create* to advance to the *Create Customer Price Group Exclusions Screen*.
Delete a customer price group exclusion	In the Action field, select *Delete* for a customer price group exclusion to advance to the Confirm Delete window. Select *Yes* to confirm the delete; otherwise, select *No* to cancel the delete.

Create Customer Price Group Exclusions Screen

Purpose: Use this screen to define an item/SKU that is not eligible for the customer price group discount applied to an order during customer price group pricing.

If an item contains SKUs, you can exclude all SKUs for the item or indicate the specific SKUs you wish to exclude from the customer price group discount.

How to display this screen: Select *Create* at the *Work with Customer Price Group Exclusions Screen*.

Field	Description
Price Group	The code of the customer price group. Code: Alphanumeric, 4 positions; display-only.
Description	The description of the customer price group. Description: Alphanumeric, 30 positions; display-only.
Item	A code for the item you wish to exclude from the customer price group discount. Item codes are defined in and validated against the Item table. You can prompt on this field to advance to the Select Item/SKU window. This window displays the first 500 item/SKU records; use the search fields to refine your search results. Alphanumeric, 12 positions; Required.
SKU	The SKU of the item you wish to exclude from the customer price group discount. 1. If the item contains SKUs and you leave the SKU blank, all SKUs of the item are excluded from the customer price group discount. 2. If the item contains SKUs and you specify a SKU, only the SKU specified is excluded from the customer price group discount. You can prompt on this field to advance to the Select Item/SKU window. This window displays the first 500 item/SKU records; use the search fields to refine your search results. Enter a full or partial SKU code and select *Search* to display customer price group exclusions whose SKU code contains your entry. Alphanumeric, three 4-position fields; Optional.

Work with Pricing Upload (WPUP)

Purpose: Use this menu option to review, correct, and process records in the *Pricing Upload Table*.

Records in the Pricing Upload table:

1. Create, update, or delete records in the Special Pricing by Source table. See *Uploading Special Pricing by Source Records*
2. Create, update, or delete records in the QPM Detail table. See *Uploading Quantity Price Matrix Detail Records*.

In this topic:

- *Work with Pricing Upload Screen*
- *Change Pricing Upload Screen*
- *Pricing Upload Error Records Report*
- *Pricing Upload Processed Records Report*

For more information: See *Pricing Upload Process* for an overview.

Work with Pricing Upload Screen

How to display this screen: Enter *WPUP* in the Fast path field on a menu screen or select Work with Pricing Upload from a menu.

The system displays Pricing Upload records on this screen is descending date sequence.

Field	Description
Date	The date the Pricing Upload record was created. Enter a valid date and select *OK* to display Pricing Upload records in descending date sequence, starting with the date you enter. Numeric, 6 positions (in user date format); optional.
Type	The type of Pricing Upload record. Valid values are: • *SRC* = Special Pricing by Source upload record. The system creates, updates, or deletes a record in the Special Pricing by Source table. • *QPM* = QPM Detail upload record. The system creates, updates, or deletes a record in the QPM Detail table. Select a type and select *OK* to display Pricing Upload records that match the type you selected. Alphanumeric, optional.

Field	Description
Action	Indicates whether the Pricing Upload record creates, updates, or deletes a record in the Special Pricing by Source or QPM Detail table. Valid values: • *Update* = Create or update a record. The system determines whether the Pricing Upload record creates or updates an existing record by comparing the information in the Pricing Upload record with the existing records in the Order Administration table. See Uploading Special Pricing by Source Records and Uploading Quantity Price Matrix Detail Records for more information on how the system determines if the Pricing Upload record creates a new record or updates an existing record. • *Delete* = Delete a record. The system uses the information in the Pricing Upload record to determine which record in the Special Pricing by Source or QPM Detail table to delete. Select an action and select *OK* to display Pricing Upload records that match the action you selected. Alphanumeric, optional.
Status	The status of the Pricing Upload record. Valid values: • *Unprocessed* = The Pricing Upload record has not yet been processed. • *Processed* = The Pricing Upload record has been processed, but the update to the Order Administration table has not yet occurred. • *Error* = The Pricing Upload record contains errors. See Pricing Upload Interface Errors. Select a status and select *OK* to display Pricing Upload records that match the status you selected. Alphanumeric, optional.
Error	A description of the error. Enter a full or partial error and select *OK* to display Pricing Upload records whose error description contains your entry. Alphanumeric, 30 positions; optional.

Screen Option	Procedure
Change a Pricing Upload record	Select *Change* for a Pricing Upload record to advance to the Change Pricing Upload Screen.
Review a Pricing Upload record	Select *Display* for a Pricing Upload record to advance to the Display Pricing Upload screen. You cannot change any fields on this screen. See the Change Pricing Upload Screen for field descriptions.
Delete a Pricing Upload record	Select *Delete* for a Pricing Upload record to delete it.
Submit the Pricing Upload process	Select *Process*. See *Pricing Upload Process* for processing details.
Print the Pricing Upload Error Records report	Select *Error Report*. See Pricing Upload Error Records Report for details.

Change Pricing Upload Screen

Purpose: Use this screen to review and update a Pricing Upload record.

The fields that display on this screen depend on the Record Type defined for the Pricing Upload record: *SRC* (Special Pricing by Source upload record) or *QPM* (QPM Detail upload record).

When you select *OK* on this screen, the system validates the fields on the screen and displays an error message if an error exists. See *Pricing Upload Interface Errors* for a list of errors.

How to display this screen: Select *Change* for a Pricing Upload record on the *Work with Pricing Upload Screen*.

Field	Description
Type	The type of Pricing Upload record. Valid values are: • *SRC* = Special Pricing by Source upload record. The system creates, updates, or deletes a record in the Special Pricing by Source table. • *QPM* = QPM Detail upload record. The system creates, updates, or deletes a record in the QPM Detail table. Alphanumeric, 3 positions; display-only.
Status	The status of the Pricing Upload record. Valid values: • *Unprocessed* = The Pricing Upload record has not yet been processed. • *Processed* = The Pricing Upload record has been processed, but the update to the Order Administration table has not yet occurred. • *Error* = The Pricing Upload record contains errors. See *Pricing Upload Interface Errors*. Alphanumeric, display-only.
Action	Indicates whether the Pricing Upload record creates, updates, or deletes a record in the Special Pricing by Source or QPM Detail table. Valid values: • *Update* = Create or update a record. The system determines whether the Pricing Upload record creates or updates an existing record by comparing the information in the Pricing Upload record with the existing records in the Order Administration table. See *Uploading Special Pricing by Source Records*and *Uploading Quantity Price Matrix Detail Records* for more information on how the system determines if the Pricing Upload record creates a new record or updates an existing record. • *Delete* = Delete a record. The system uses the information in the Pricing Upload record to determine which record in the Special Pricing by Source or QPM Detail table to delete. Alphanumeric, display-only.
Error	A description of the error. See *Pricing Upload Interface Errors* for a list of errors. Alphanumeric, 30 positions; display-only.

Field	Description
Seq #	A unique sequence number assigned to the Pricing Upload record. Numeric, 9 positions; display-only.
Date	The date the Pricing Upload record was created. Numeric, 6 positions (in user date format); display-only.
Item	The item defined for the Pricing Upload record. Item codes are defined in and validated against the Item table. **Special Pricing by Source** The item associated with the special source price. Corresponds to the ITM Number field in the Special Pricing by Source table. **QPM Detail** A code for the item associated with the quantity price matrix detail. You must define an item category or item for a quantity price matrix price, but not both. Corresponds to the Item field in the QPM Detail table. Alphanumeric, 12 positions; required for SRC record type.
SKU	Displays for *QPM* Pricing Upload records only. A code for the SKU of the item associated with the quantity price matrix detail. SKU codes are defined in and validated against the SKU table. • If you define a SKU for the item, only the SKU specified qualifies for the quantity price matrix detail. • If you do not define a SKU for the item, all of the SKUs for the item qualify for the quantity price matrix detail. Corresponds to the SKU field in the QPM Detail table. Alphanumeric, 14 positions; optional.
Quantity	**Special Pricing by Source** The quantity of the item that must be purchased to receive the specified price break. Corresponds to the Qty field in the Special Pricing by Source table. **QPM Detail** The quantity of the item that must be ordered to qualify for the quantity price matrix detail. The item qualifies for the quantity price matrix detail if the order line quantity is less than or equal to the quantity pice matrix detail. You cannot create more than one quantity price matrix price break for the same item category and quantity, item and quantity, or item and SKU and quantity. Corresponds to the Quantity field in the QPM Detail table. Numeric, 5 positions; required.

Field	Description
Source	The source code associated with the pricing upload record. Source codes are defined in and validated against the Source Code table. **Special Pricing by Source** The source code associated with the Special Pricing by Source record. Corresponds to the Source Code field in the Special Pricing by Source table. **QPM Detail** The source code that must exist on the order header in order to qualify for the QPM price. Corresponds to the Source field in the QPM Detail table. Alphanumeric, 9 positions; required for Record Type SRC.
Price	The price at which the item will be sold if the pricing requirements are met. **Special Pricing by Source** Corresponds to the Price field in the Special Pricing by Source table. **Note:** For Special Pricing by Source records, the price cannot be greater than 7 positions with a 2 place decimal. **QPM Detail** Corresponds to the Price field in the QPM Detail table. Numeric, 13 positions with a 2 place decimal; required for Record Type SRC.

Field	Description
Tax Inclusive Price	The price at which the item will be sold to customers if the order is subject to VAT and if the pricing requirements are met. **Note:** This field displays only if the *Tax Included in Price (E70)* system control value is selected. Special Pricing by Source Corresponds to the Tax Price field in the Special Pricing by Source table. **Note:** For Special Pricing by Source records, the tax price cannot be greater than 7 positions with a 2 place decimal. **QPM Detail** Corresponds to the Tax Price field in the QPM Detail table. Numeric, 13 positions with a 2 place decimal; optional.
Associate Price	Displays for *SRC* Pricing Upload records only. The price at which the item will be sold to associate customers if the pricing requirements are met. Corresponds to the Associate Price field in the Special Pricing by Source table. **Note:** The associate price cannot be greater than 7 positions with a 2 place decimal. Numeric, 13 positions with a 2 place decimal; optional.

Field	Description
Tax Inclusive Associate Price	Displays for *SRC* Pricing Upload records only. **Note:** This field displays only if the *Tax Included in Price (E70)* system control value is selected. The price at which the item will be sold to associate customers if the order is subject to VAT and if the pricing requirements are met. Corresponds to the Associate Tax Price field in the Special Pricing by Source table. **Note:** For Special Pricing by Source records, the associate tax price cannot be greater than 7 positions with a 2 place decimal. Numeric, 13 positions with a 2 place decimal; optional.
QPM Code	Displays for *QPM* Pricing Upload records only. The quantity price matrix code associated with the QPM Detail price. QPM codes are defined in and validated against the QPM Header table. Corresponds to the Code field in the QPM Detail table. Alphanumeric, 4 positions; required for Record Type QPM.
Item Category	Displays for *QPM* Pricing Upload records only. A code for the item category associated with the quantity price matrix detail. You must define an item category or item for a quantity price matrix price, but not both. Item category codes are defined in and validated against the Item Category table. Corresponds to the Item Category field in the QPM Detail table. Alphanumeric, 4 positions; optional.
Customer Sold To #	Displays for *QPM* Pricing Upload records only. The sold to customer that must exist on the order in order to qualify for the QPM price. Customer sold to numbers are defined in and validated against the Customer Sold To table. Corresponds to the Customer field in the QPM Detail table. Numeric, 9 positions; optional.

Field	Description
Customer Price Group	Displays for *QPM* Pricing Upload records only. The customer price group for the sold to customer on the order header in order to qualify for the QPM price. Customer price group codes are defined in and validated against the Customer Price Group table. Corresponds to the Price Group field in the QPM Detail table. Alphanumeric, 4 positions; optional.
Expire date	Displays for *QPM* Pricing Upload records only. The date the quantity price matrix price expires. The date cannot be earlier than the current date. Corresponds to the Exp Date field in the QPM Detail table. Numeric, 6 positions (in user date format); optional.
Discount %	Displays for *QPM* Pricing Upload records only. The percentage of the quantity price matrix detail price when the item ordered is eligible for the quantity price matrix special. For example, *10* means the item qualifies for a 10% discount. Corresponds to the Discount % field in the QPM Detail table. *Example:* The % discount is based on the following criteria: • customer price group = QPM1 • item category = HG • quantity = 2 • % discount = 10 • The 10% discount is based on the quantity price matrix detail defined for item category HG and quantity 2: • item category = HG • quantity = 2 • price = 10.00 In this example, the 10% discount is a 1.00 discount (10.00 QPM detail - 10% QPM special = 9.00 discount price) If a quantity price matrix detail is not defined for item category HG and quantity 2, the system uses the next lowest quantity for the item category (in this example, the system uses item category HG and quantity 1). See *Calculating the QPM Price* for more information on how the system finds the price for a quantity price matrix detail and quantity price matrix special. Numeric, 4 positions with a 2 place decimal; optional.

Reviewing Forecasting Information

Topics in this part:

- *Inventory Status Inquiry (ISIQ)* allows you to review the current inventory status and order totals for an item by offer.
- *Generating Forecasting Reports* provides descriptions and examples of several reports that help you evaluate sales response for an offer and plan and reorder merchandise.

Inventory Status Inquiry (ISIQ)

Purpose: Use Inventory Status Inquiry to view order activity for any item or SKU broken out by offer. The information includes total and net orders and sales; returns, cancellations, and exchanges; and purchase order figures. You can break out the information in three basic ways:

- summarizing all SKUs for a SKU'd item
- selecting a specific SKU for a SKU'd item
- summarizing activity for a non-SKU'd item

Other options: You can use the following additional menu options for inventory inquiry:

- *Using Inventory Inquiry (DINI)*: to review inventory information for items within warehouses and locations in warehouses
- *Inventory Inquiry by Item (IIQI)*: to review item information organized by the base item and the first SKU element

In this topic:

- *Inventory Status Inquiry Screen*
- *Inventory Status - Non SKU Screen (1 of 2)*
- *Inventory Status - Non SKU Screen (2 of 2)*
- *Inventory Status - SKU Screen (1 of 2)*
- *Inventory Status - SKU Screen (2 of 2)*
- *Inventory Status - All SKUs Screen (1 of 2)*
- *Inventory Status - All SKUs Screen (2 of 2)*

Additional inventory inquiries:

- *Using Inventory Inquiry (DINI)* for detailed information on the availability and demand for an item or SKU in a particular warehouse or locations within a warehouse.
- *Inventory Inquiry by Item (IIQI)* for detailed information on availability, demand and life-to-date history of an item and each of its individual SKUs.

Inventory Status Inquiry Screen

Purpose: Use this screen to select the item/SKU you want to view.

How to display this screen: Enter *ISIQ* in the Fast Path field at the top of any menu or select Inventory Status Inquiry from a menu.

Field	Description
Item	The code of the item you want to review. The item code is validated against the Item table. Alphanumeric, 12 positions; required.
Clr/Size/Wdth (SKUs)	The item's unique characteristics, such as its color and size. Alphanumeric, three 4-position fields; optional.

Completing this screen: Enter an item code in the Item field. If you are inquiring about a SKU'd item, enter SKU information if you want to review information about that specific SKU only; leave the SKU fields blank if you want to review combined information for all SKUs. You advance to the *Inventory Status - Non SKU Screen (1 of 2)*, *Inventory Status - SKU Screen (1 of 2)*, or *Inventory Status - All SKUs Screen (1 of 2)* depending on your entries.

Inventory Status - Non SKU Screen (1 of 2)

Purpose: Use this screen to review order, return, exchange and cancellation totals for each offer where the item is sold.

How to display this screen: Enter a non-SKU'd item at the *Inventory Status Inquiry Screen*.

Fields: Each field on this screen, the *Inventory Status - SKU Screen (1 of 2)*, and the *Inventory Status - All SKUs Screen (1 of 2)* is described below.

Field	Description
Item	A code representing a unit of inventory. Alphanumeric, 12 positions.
Item description (Unlabeled field to the right of the item code)	The description associated with the item. Alphanumeric, 120 positions.
SKU (Unlabeled field below the item description)	The SKUs you entered on the selection screen, if any. Alphanumeric, three 4-position fields.
Retail	The price defined for the item in the most current offer. If this is the All SKUs screen, and you define prices at the SKU level rather than the item level, the price will display as zero. Numeric, 13 positions with a 2-place decimal.
Cost	The cost of the item. The cost is defined in the SKU table. The new purchase cost represents the actual cost at which the item was purchased plus any overhead charges and additional item charges. See *Purchase Order Receiving Overview*. Numeric, 13 positions with a 2-place decimal. **The following fields represent column headings for inventory information calculated for:** • Total: This row of figures represents the total for all offers for the item or SKU you entered at the selection screen. • Ofr (offer): This row of figures represents the total for this offer only. An offer is a catalog or advertisement you use to present items to your customers. The offer code is defined in and validated against the Offer table. See *Working with Offers (WOFR)*.
Ord (Ordered)	The total quantity ordered. If the *Update Demand for Order Maintenance Transactions (C72)* system control value is *selected*, the system also updates this field to reflect: • lines added in Order Maintenance • exchanges • changes of item quantity made in Order Maintenance Numeric, 7 positions.
Can (Canceled)	The total quantity canceled. Numeric, 7 positions.
S/O (Soldout)	The total quantity sold out. Numeric, 7 positions.

Field	Description
Ship	The total quantity shipped. Numeric, 7 positions.
Rtn (Returned)	The total quantity returned. Numeric, 7 positions.
Exch (Exchanged)	The total quantity exchanged. Numeric, 7 positions.
Net ord (Net orders)	The net order quantity, calculated as: `Total orders - (total returned + total exchanged)` If a customer exchanges an item for the exact same item and SKU, there is no effect on net orders for that particular item/SKU. Cancels and soldouts do not affect net orders. Numeric, 7 positions.
Act % (Actual return percent)	The actual return percentage for the item or SKU, calculated as: `(( units returned + units exchanged) / units shipped) x 100` Numeric, 5 positions with a 2-place decimal.

Screen Option	Procedure
Advance to the second Inventory Status Inquiry screen	Select *Right* to advance to the *Inventory Status - Non SKU Screen (2 of 2)*, *Inventory Status - SKU Screen (2 of 2)*, or *Inventory Status - All SKUs Screen (2 of 2)*.

Inventory Status - Non SKU Screen (2 of 2)

How to display this screen: Select *Right* at the Inventory Status - Non SKU Screen (1 of 2).

Field	Description
Net sales	The net amount of the item or SKU sold, calculated as `Total shipped - (Total returns + Total exchanges)` Numeric, 7 positions.
On PO (On purchase order)	The total quantity of the item or SKU on open purchase orders. Numeric, 7 positions.

Screen Option	Procedure
Return to the first Inventory Status Inquiry screen	Select *Left* to advance to the *Inventory Status - Non SKU Screen (1 of 2)*.

Inventory Status - SKU Screen (1 of 2)

How to display this screen: Enter a SKU'd item at the *Inventory Status Inquiry Screen*.

For more information: See *Inventory Status - Non SKU Screen (1 of 2)* for field descriptions.

Inventory Status - SKU Screen (2 of 2)

How to display this screen: Select *Right* at the Inventory Status - SKU Screen (2 of 2).

For more information: See *Inventory Status - Non SKU Screen (2 of 2)*.

Inventory Status - All SKUs Screen (1 of 2)

How to display this screen: Select *OK* at the *Inventory Status Inquiry Screen* without entering an item or SKU.

For more information: See *Inventory Status - Non SKU Screen (1 of 2)* for field descriptions.

Inventory Status - All SKUs Screen (2 of 2)

How to display this screen: Select *Right* at the *Inventory Status - All SKUs Screen (1 of 2)*.

For more information: See *Inventory Status - Non SKU Screen (2 of 2)*

Print Product Performance Reports (PPPR)

Purpose: Use the *Product Performance Report (Ordered Totals)* and *Product Performance Report (Shipped Totals)* to review total quantities and dollar values of items ordered or shipped for a range of dates, as well as current inventory status.

Totals not net of returns, cancels, soldouts, or after-shipment discounts: The shipped totals on the *Product Performance Report (Shipped Totals)* do not reflect any returns that have been processed against the items. For example, if there have been 100 units of an item shipped, and 15 returned, the quantity shipped on the report is 100, not 85.

Similarly, the ordered totals on the *Product Performance Report (Ordered Totals)* does not reflect any quantities sold out or canceled (unless you use a cancel reason flagged to reduce demand). If there have been 200 units of an item ordered, and 7 sold out, the ordered total is 200, not 193.

Also, the dollar totals do not reflect any discounts applied after shipment using the *Discount* option in order maintenance. For example, you shipped 10 units for an extended price of $200.00. Afterward, you applied a discount of 10% in order to preserve customer satisfaction because of an issue related to the order. The Merch dollars shipped total on the report is still $200.00 and does not reflect the 10% discount.

Component items not included: The report includes the main set item rather than its components. Items that are components of sets are included on the report only if they were ordered or shipped as stand-alone items. See *Working with Sets* for background on working with set items.

Quotes excluded: This report excludes quotes, identified by the Quote flag on the order type on the order. See *Entering Pre-Order Quotes* for an overview.

In this topic:

- *Product Performance Reports Screen*
- *Product Performance Report (Ordered Totals)*
- *Product Performance Report (Shipped Totals)*

Product Performance Reports Screen

How to display this screen: Enter *PPPR* in the Fast path field at the top of any menu, or select Print Product Performance Reports from a menu.

Field	Description
Start Date	Enter the first order or shipment date to include on the report. The report includes items that have been ordered (based on the order's Entered date) or shipped on or after this date. The start date must be on or earlier than the current date and the end date. Numeric, 6 positions (in user date format); required.
End Date	Enter the last order or shipment date to include on the report. The report includes items that have been ordered (based on the order's Entered date) or shipped on or before this date. The end date must be on or earlier than the current date and no earlier than the start date. Numeric, 6 positions (in user date format); required.
Report Option	Indicate whether the report should include total units and dollars ordered or shipped, and how to sort the report: • *Ordered Product Performance by Ascending Items* = Generate the *Product Performance Report (Ordered Totals)* in alphanumeric order by item code • *Ordered Product Performance by Descending Total Dollars* = Generate the *Product Performance Report (Ordered Totals)* listing items beginning with the item/SKU with the highest Merchandise Dollars Ordered for the selected date range and descending to the item/SKU with the lowest Merchandise Dollars Ordered • *Ordered Product Performance by Order Type* = Generates the *Product Performance Report (Ordered Totals)* listing items sorted first by the order type on which they were ordered, and then in alphanumeric order by item code • *Shipped Product Performance by Ascending Items* = Generate the *Product Performance Report (Shipped Totals)* in alphanumeric order by item code • *Shipped Product Performance by Descending Total Dollars* = Generate the Product Performance Report (Shipped Totals) listing items beginning with the item/SKU with the highest Merchandise Dollars Shipped for the selected date range and descending to the item/SKU with the lowest Merchandise Dollars Shipped • *Shipped Product Performance by Order Type* = Generates the Product Performance Report (Shipped Totals) listing items sorted first by the order type on which they were ordered and shipped, and then in descending order by shipped quantity

Completing this screen: Complete all fields as described above and select *Print Report* to submit the *PROD_PERFF* job, which generates the *Product Performance Report (Ordered Totals)* or the *Product Performance Report (Shipped Totals)*.

Print Campaign Performance Reports (PCPR)

Purpose: Use these reports to evaluate the success of marketing campaigns based on performance statistics.

Quotes: The campaign performance reports do not include quotes, identified by the Quote flag on the order type on the order. See *Entering Pre-Order Quotes* for an overview.

Campaign Performance Report Screen

How to display this screen: Enter *PCPR* in the Fast path field at the top of any menu, or select Print Campaign Performance Report from a menu.

Field	Description
Start date	Specify the first order date to include on the report. The report includes orders with order dates on or after this date, regardless of whether you are generating the *Ordered Dollars* or the *Shipped Dollars* version of the report. Numeric, 6 positions (in user date format); required.
End date	Specify the last order date to include on the report. The report includes orders with order dates before or on this date, regardless of whether you are generating the *Ordered Dollars* or the *Shipped Dollars* version of the report. The End date cannot be earlier than the Start date. Numeric, 6 positions (in user date format); required.
Source category	Optionally, enter a source category to include on the report, or leave this field blank to include all source codes regardless of category. You can use source code categories to classify your source codes, such as buyers, recipients, or rented names. Source code categories are defined in and validated against the Source Code Category table. See *Working with Source Categories (WSCT)*. Alphanumeric, 2 positions; optional.
Drop code	Optionally, enter a drop code to include on the report, or leave this field blank to include all source codes regardless of drop. Drop codes identify a catalog mailing to a list of customers. Alphanumeric, 2 positions; optional.
Ordered/Shipped	Select whether the report should indicate the total dollar value ordered or shipped during the selected date range: *Ordered* = The performance order dollar totals include merchandise ordered. *Shipped* = The performance order dollar totals include merchandise shipped. Required.

Completing this screen: Complete each field as described above and select *Print Report* to generate the Campaign Performance Report (PCPR).

Print Order Promotion Analysis Report (POPA)

Purpose: Use this report to evaluate the performance of a promotion, or all promotions with start dates within a selected time frame.

Print Promotion Analysis Report Screen

Purpose: Enter *POPA* in the Fast path field at the top of any menu, or select Order Promotion Analysis Report from a menu.

Field	Description
Start date from	The first date to include in the report, based on a promotion's start date. If you select a Start date from and an End date, the report includes promotions that have start dates on or after this date and on or before the End date. *Example:* If you enter a Start date of 6/1 and End date of 6/30, the report includes promotions whose start and end dates are: • 6/1 - 6/30 • 6/15 - 6/30 • 6/2 - 6/15 However, the report does not include promotions whose start and end dates are 5/30 - 6/30. **Note:** The date selections are based on the date range currently specified for the promotion, rather than the dates when the promotion applied to orders. If you use this report, it is important not to change the date range for a promotion, because it might not be included in the report even if it was in effect between the Start date and an End date you specify here. If you specify a Start date and an End date, you cannot specify a promotion. Numeric, 6 positions (in user date format); required if you do not specify a promotion.
End date	The last date to include on the report, based on a promotion's current start date. See the Start date, above, for a discussion. Numeric, 6 positions (in user date format); required if you do not specify a promotion.
Promotion code	The promotion to include on the report. Promotions are defined in and validated against the Promotion table; see *Working with Promotions (WPRO)* for more information. If you specify a promotion, you cannot specify a Start date and End date. **Required entry?** A promotion is included in the report when you run the report by date range regardless of whether its Required entry flag is selected; however, you cannot run the report for a single promotion unless the promotion's Required entry flag is selected. Alphanumeric, 7 positions; required if you do not specify a Start date and End date.

Completing this screen: Complete either the *Start date from* and *End date* or the *Promotion code*, as described above, and select *Submit* to generate the *Promotion Analysis Report*.

Using House List Options

Topic in this part:

- *Working with Merge/Purge Sold-to Names (MMCS)* describes how to generate a listing of duplicate records and merge customer sold-to records.
- *Merging and Purging Customer Bill To Names (MMCB)* describes how to merge customer bill-to records.

Merging and Purging Customer Bill To Names (MMCB)

Purpose: Merging and purging customer bill-to names allows you to merge the bill-to information from a source bill-to customer record with a target bill-to record. More than one source bill-to can point to a single target bill-to number. You determine which customer bill-to is the target and which is the source bill-to record. The target record remains on the system, and the source bill-to is automatically deleted when you perform the merge/purge option.

For example, you might need to consolidate branch office bill-to records that were kept separately on the system and consolidate the information with the corporate bill-to account. This option lets you merge one source and target bill-to record at a time; although, you can merge several source bill-tos with a target bill-to by performing the merge/purge option for each source/target bill-to combination.

In this topic:

- *Merge/Purge Customer Bill To Screen*
- *Merge/Purge Logic*
- *How Are the Bill-To Tables Updated?*

Merging and Purging

Merge/Purge Customer Bill To Screen

How to display this screen: Enter *MMCB* in the Fast Path field at the top of any menu or select the Merge/Purge Customer Bill To option from a menu.

Field	Description
Source bill-to cust	The bill-to *Acct #* that you want to change to a source customer. Numeric, 9 positions; required.
Target bill-to cust	The number for the bill-to customer that you wish to designate as the target customer. When you perform the merge/purge option, the information from the source customer you designated in the previous field will be consolidated with the target bill-to customer, and the source bill-to will be deleted from the system. Numeric, 9 positions; required.

Instructions:

1. Complete the Source bill-to customer and Target bill to customer fields.

2. If you wish to merge the source bill-to with the target bill-to customer record, select *Perform Merge/Purge* to have the system submit the *MERGBILLTO* job for processing.

Once this job has completed processing, the source bill-to record is purged from the system, and the information from the source bill-to is consolidated with the information for the target bill-to.

Merge/Purge Logic

When you process a bill-to merge/purge, the system attempts to keep the best, most recent and most complete information for the target and source customer consolidated into one bill-to customer record.

Affected Table	Comments
Customer Bill To Customer Bill To Extended	See *How Are the Bill-To Tables Updated?*
Customer Bill To Note	Adds the source notes to the target.
Customer Bill To Phone #	Uses most recent phone numbers based on change date.
Cust Bill To Mail Hist	Adds the source history to the target history.
Cust Bill To User Field	If any user field is blank for the target customer but not the source customer, uses the source information.

How Are the Bill-To Tables Updated?

Field	How Updated?
Address information:	NA
Prefix First name Middle initial Last Name Suffix Company name Street Address Apartment Address line 2 Address line 3 Address line 4 City State Zip Delivery code PO Box?	Uses the target information.
Additional information:	NA

Field	How Updated?
Match code Opt in/opt out Match code Fax flag EDI flag Additional documents flag Language code Currency code	Uses the target information.
Email address	If the source has information in the field and the target does not, uses the source information.

Working with Merge/Purge Sold-to Names (MMCS)

Purpose: Merging and purging customer sold-to names allows you to streamline your customer database by consolidating order and sales information from customers that have duplicate match codes (source customers) into a target customer record. Several source customer numbers can point to the same target customer number if they all share a match code. The system selects the oldest customer record as the target customer. This is the customer number that remains on the system when you run the merge/purge.

When you process the merge/purge, the system consolidates information from each source customer with the target customer. In each case, the system attempts to preserve the most current and complete information. The logic that the system uses in performing the merge/purge is discussed later in this topic.

> **Note:**
>
> It is recommended that you process the merge/purge for your bill-to customers before your sold-to customer, to avoid unnecessary duplicate bill-to errors.

Where do duplicates come from? Duplicate codes can result when two customers have demographic information close enough to produce identical match codes. For example, Gerald Smith and Geraldine Smith live at the same address, and use the same nickname, Jerry. A duplicate can also occur during Order Entry if a customer uses a variation of his first name on different orders. For example, Jonathan Jones places orders on two occasions and gives Jon as his first name on one order, Jonathan as his first name on another order.

Omitting customers from merge/purge: You can use the delete option at the *Work with Source Customers Screen* to omit a customer from the merge. Using this option flags the customer's Status as *M*, which indicates to omit the customer from future merge/purge lists. To reset all customers flagged with the *M* status and make them eligible for merge/purge selection again, use the *Clearing Customer Sold To Status (MCST)* menu option.

Adding records to the merge/purge: This function also allows you to create target and source customers in order to merge customer records that the system would not ordinarily select because the match codes are entirely different.

For example, if customer Ann Delaney resumes using her maiden name, Williams, and places an order under that name, you would want to merge Ann Delaney's customer and order history with her new customer record, Ann Williams. In order to do this, you would want to create Ann Williams as the target customer and Ann Delaney as the source customer.

If you have not generated a list of duplicate records to work with, this should be the first option that you perform. Then you can review and change customer sold-to records, if necessary, in preparation for the merge/purge.

E-Commerce: If the *Generate E-Commerce Customer Merge Staging Files (H86)* system control value is selected, the system generates an E-Commerce Customer Merge Web XML File (CustomerMergeWeb). The web storefront can use this file to review customers that have been merged in Order Administration and update the customer sold to records for the web. See the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

File storage API: If the Generate E-Commerce Customer Merge Staging Files (H86) system control value is selected, the merge/purge program creates a zip file in the OMS-ECOMMERCE container of the FILE_STORAGE table. The zip file contains the *E-Commerce Customer Merge Web XML File (CustomerMergeWeb)*. You can use the file storage API to download the file. See the *File Storage API* for background.

In this topic:

- *Merge/Purge Customer Sold To Screen*
- *Submit Generation Window (Generating a List)*
- *Ghost Customers*
- *Maximum Number of Source Customers*
- *Confirm Delete Window (Deleting a List)*
- *Work with Source Customers Screen*
- *Create Target Customer Screen*
- *Creating a Source Customer*
- *Performing a Merge*
- *Display Customer Screen*
- *Merge/Purge Logic*
- *How are the Customer Tables Updated?*
- *E-Commerce Customer Merge Web XML File (CustomerMergeWeb)*

For more information: See *Clearing Customer Sold To Status (MCST)*.

Merge/Purge Customer Sold To Screen

How to display this screen: Enter *MMCS* in the Fast Path field at the top of any menu or select the Merge/Purge Customer Sold To option from a menu.

About this screen: This screen will contain no data if you have not generated a listing of customers with duplicate match codes by selecting *Generate List*. See *Submit Generation Window (Generating a List)*.

If you have already generated a listing, this screen will show the names of target customer records, along with the customer numbers that have duplicate match codes. The duplicate match code customer numbers appear in bold below the target customer name.

Field	Description
Customer #	The number assigned to the target customer; the system appends relevant information from the source customer onto the target customer record. Numeric, 9 positions; optional.
Name	The name or company name of the customer. Customer names display last name first. Company name: alphanumeric, 30 positions; display-only. Customer name: alphanumeric, 25 positions (last name) and 15 positions (first name); display-only.)
Duplicate	The customer number of the duplicate (source) customer record. If there is more than one source customer, the additional customer numbers will display. Numeric, 9 positions; display-only.
Status	The status of a customer record. Valid values are: *B* = Bill to Duplicate *O* = Open Enter a valid status code to display records of that status. Optional.

Screen Option	Procedure
Create target customer	Select *Create* to advance to the *Create Target Customer Screen*.
Delete a customer sold-to merge/purge record	Select *Delete* for a customer to delete a customer sold-to record from the merge.
Work with existing duplicates (source customers) or add duplicates	Select *Duplicates* for a customer to advance to the *Work with Source Customers Screen* in Change mode. See Creating a Source Customer for information on working with this screen in Add mode.
Change customer sold-to	Select *Change cust sold to* for a customer to advance to the *Display Customer Screen*.
Display customer sold-to	Select *Display cust sold to* for a customer to advance to the *Display Customer Screen*.
Generate a list of duplicate customer names	Select *Generate List* to submit this job for processing. See *Submit Generation Window (Generating a List)*.

Note:

This option displays only if you have authority to the *Allow Generate List in Merge/Purge (J06)* secured feature.

Screen Option	Procedure
Delete list of target and source customers	Select *Delete list* to delete the list. See *Confirm Delete Window (Deleting a List)*.
Merge and purge customers	Select *Perform Merge* to submit the merge/purge job for processing. See *Performing a Merge*.

Submit Generation Window (Generating a List)

Purpose: To generate a list of duplicate names eligible for merge/purge, select *Generate List* at the *Merge/Purge Customer Sold To Screen*.

> **Note:**
>
> The *Allow Generate List in Merge/Purge (J06)* secured feature controls access to the *Generate List* option on the *Merge/Purge Customer Sold To Screen*.

Ghost Customers

Use the Save source as ghost field on this window to indicate whether you want to delete or save source customer records with duplicate match codes once the order and customer history is merged with the target record. The *Ghost?* field defaults to *unselected*, but you can change it to *Selected*.

Records retained: If you select this field, the system will retain the source customer record in the Customer Sold To table, but the record will be flagged as a Ghost customer. All other records, such as alternate customer numbers, phone numbers, email, order history, billing history, mail history and entity history will not exist for the ghost customer, since all other records are merged into the target customer's records; see *Merge/Purge Logic*.

Ghost Customer window: When you enter a Ghost customer number in order entry, or when entering a catalog request or customer membership, a pop-up window will inform you that the customer number you entered belongs to a Ghost customer, and will indicate the target customer you can enter instead. See *Ghost Customer Number Warning Window*.

Ghost customer restrictions: Ghost customers continue to be available for review; however, if you enter a ghost customer number in any maintenance function, the system does not display any history, such as orders or catalog requests, because all history has been merged to the target customer. Additionally, you cannot include a ghost customer as a target customer or source customer in a future merge/purge.

Maximum Number of Source Customers

You can also define the maximum number of source customers you wish to process for a target customer. If you enter a maximum number, the system will complete the merge/purge process once the maximum number has been reached and the update for the target customer the system is currently working on has completed.

When you complete this screen and press *Enter*, the system submits the batch job *M_PGENERAT*, and returns you to the Merge/Purge Customer Sold To screen; exit and re-enter to review the generated list.

Confirm Delete Window (Deleting a List)

Purpose: To delete the existing list of target and source customers and clear the Customer Merge/Purge tables, select *Delete list* at the *Merge/Purge Customer Sold To Screen*.

Work with Source Customers Screen

Purpose: Once you have generated the list of target and source customers, you can work with the duplicate, or source customers; optionally, you can retain the records of the source customers by flagging them as *Ghost?*. Use this screen in Add mode to select a source customer for a target customer you added to the merge/purge list using the Create option at the *Merge/Purge Customer Sold To Screen*; see *Creating a Source Customer*.

When you delete a customer at this screen, it sets the customer's Status to *M*, which indicates not to select the customer for subsequent merge/purge lists. To clear a status of *M* from any flagged record in the Customer Sold To file, use the *Clearing Customer Sold To Status (MCST)* menu option. Once you use this menu option to clear all *M* statuses, the customers are eligible for selection the next time you generate a merge/purge list.

How to display this screen: Select *Duplicates* for a target customer at the *Merge/Purge Customer Sold To Screen*.

About this screen: This screen includes each source customer for the target customer, including both matches found by the system and source customers you selected.

Field	Description
Customer #	The number assigned to the source customer; the system appends relevant information from the source customer onto the target customer record. Numeric, 9 positions; optional.
Name	The name or company name of the customer. Customer names display last name first. Company name: alphanumeric, 30 positions; display-only. Customer name: alphanumeric, 25 positions (last name) and 15 positions (first name); display-only.)
Ghost?	A ghost customer is a source customer whose records have been merged into a target customer's records. Select this field to retain the customer records in the Customer Sold To table for the source customer after you have completed the Merge/Purge. If you retain ghost customer records, the system will flag the records as Ghost customers. When you enter a Ghost customer number in order entry, or when entering a catalog request or customer membership, a pop-up window will inform you that the customer number you entered belongs to a Ghost customer, and will indicate the target customer you can enter instead. See *Ghost Customer Number Warning Window*. Alphanumeric, 1 position; required.

Screen Option	Procedure
Add a source customer to the merge/purge	Select *Create* to advance to Add mode. See *Creating a Source Customer*.

Screen Option	Procedure
Delete a source customer from the merge/purge	Select *Delete* for a customer to delete the customer record from the record from the merge/purge and subsequent merge/purges. See *Clearing Customer Sold To Status (MCST)* for more information.
Change customer sold-to	Select *Change cust sold to* for a customer to advance to the *First Create Sold To Customer Screen*.
Display customer sold-to	Select *Display cust sold to* for a customer to advance to the *Display Customer Screen*.

Create Target Customer Screen

Purpose: You can create a target customer in order to merge customer records that the system would not normally select because the match codes are entirely different.

How to display this screen: Select *Create* on the *Merge/Purge Customer Sold To Screen*.

Field	Description
Target customer	The customer number for the sold-to customer that you wish to add to the merge/purge as a target customer. If you select any source records for this customer (see Creating a Source Customer), the system will consolidate the customer records when you perform the merge/purge. Numeric, 9 positions; required.

Instructions:

1. Complete the Target customer field.
2. You receive a system message informing you that a Customer Merge/Purge Target (Comp #/Cust #) has been created. When you return to the *Merge/Purge Customer Sold To Screen*, the target customer you just created now appears.
3. To select a source customer and link it to the target customer so the records will be consolidated when you process the merge/purge, see *Creating a Source Customer*.

Creating a Source Customer

Purpose: Use this option to select a source customer to merge with a target customer that you created manually (through the Create option at the *Merge/Purge Customer Sold To Screen*). You can also use this option to change source customers for merge/purge records created by the system; see *Work with Source Customers Screen*.

How to display this screen: Select *Duplicates* for a target customer record on the *Merge/Purge Customer Sold To Screen*, then select *Create* at the *Work with Source Customers Screen* to advance to Add mode.

About this screen: Each field on this screen is described under *Work with Source Customers Screen*.

Instructions:

1. Enter the Customer # for each customer record you would like to add as a source customer.
2. Optionally, select Ghost? field for each customer to add.
3. When you return to the *Merge/Purge Customer Sold To Screen*, the customer number you created as a source customer appears in the Duplicate field below the target customer.

Performing a Merge

Purpose: Use this option to merge the customer and order history of a target customer with a source customer(s) and purge source customer records from the system.

To perform a merge/purge: To merge the order and customer history of the source with the target customer, select *Perform Merge* at the *Merge/Purge Customer Sold To Screen*. A message displays announcing that *MERGE_PURG* job has been submitted.

See *Merge/Purge Logic* for a discussion of which tables are affected by the merge/purge, and how the system determines which information to keep from the target or source customers.

Display Customer Screen

To display: Select *Display cust sold to* for a target customer at the *Merge/Purge Customer Sold To Screen* to advance to the first Display Customer screen. You cannot change anything on this screen.

Merge/Purge Logic

When you process a merge/purge through *Working with Merge/Purge Sold-to Names (MMCS)*, the system attempts to keep the best, most recent and most complete information for the target and source customers consolidated into one customer record. See *Understanding Customer Types*.

Affected Table	Comments
Alternate Customer # Cross Reference	Adds source records to target.
Catalog Requests	Adds source requests to target.
Correspondence History	Adds source emails to target.
Customer Action	Adds the source information to the target.
Customer Address Change	Adds source address changes to target. See How are the Customer Tables Updated?
Customer Contract Pricing	Adds the source information to the target.
Customer Fraud	Adds the source information to the target.
Customer Note	Adds the source notes to the target.
Customer Ownership	Adds the source information to the target.
Customer Pay Type Exclusion	Adds the source information to the target.
Customer Profile	For any of these fields, if the source has information and the target does not, uses the source information.
Customer Ship To	Merges matching ship-to customers based on match code; adds additional source ship-to customers to target.
Customer Ship To Extended	See How are the Customer Tables Updated?
Customer Ship To Mail History	Adds the source information to the target.

Affected Table	Comments
Customer Ship To Order History	Adds the source history to the target history.
Customer Ship-To Phone Number	Uses most recent phone numbers based on change date. See How are the Customer Tables Updated?
Customer Sold To	See How are the Customer Tables Updated?
Customer Sold To Email	Adds source records to target; target's primary email address does not change.
Customer Sold To Extended	See How are the Customer Tables Updated?
Customer Sold To Item Class	Adds the source information to the target.
Customer Sold To Mail History	Adds the source information to the target.
Customer Sold To Order History	Adds the source history to the target history. See *How are the Customer Tables Updated?* for more information.
Customer Sold To Phone Number	Uses most recent phone numbers based on change date.
Customer Sold To Promotion	Adds the source information to the target.
Customer Sold To User Fields	If any user field is blank for the target customer but not the source customer, uses the source information.
Customer Subscription	Adds the source information to the target.
Customer Tax	Adds the source information to the target.
Customer Warehouse	Order Administration uses the following logic: • if the source has a customer warehouse and the target does not, use the source customer warehouse. • if the target has a customer warehouse and the source does not, use the target customer warehouse and delete the source customer warehouse.
Customer Warranty	Adds the source records to the target customer.
Order Billing History (both sold-to and ship-to customers)	Adds all target and source dollar and quantity figures together; see below for additional information.
Order Header	Adds the source records to the target.
Order Ship To	Adds the source records to the target.
Pick Control Header	Adds the source records to the target.
Pick Gen Select Customer	Adds the source records to the target.
Pick Gen Select PO	Adds the source records to the target.
PO Header	Adds the source records to the target.
Promotion Customer	Adds the source records to the target.
Store Pickup Header	Adds the source records to the target. Not currently implemented.
Tickler	Adds the source records to the target.
Tickler History	Adds the source records to the target.

How are the Customer Tables Updated?

Field	How Updated?
Address information:	NA
Prefix First name Middle initial Last Name Suffix Company name Street Address Apartment Address line 2 Address line 3 Address line 4 City State Zip Delivery code PO Box? Phone numbers Match code User fields 1-4	The system decides which information to keep based on the Change date from the most recent record in the Customer Address Change table and the Last order date in the Customer Order History table. • If the Last Change date for the source customer is more recent than the last Change date for the target customer, the system uses the source address information and creates a customer address change record for the target. • If there is no last Change date for either the target or the source, the system compares the target and source Last order date. If the Last order date for the source customer is more recent than the target customer, the system uses the source address information and creates a customer address change record for the target, as above. **Phone numbers:** If the system uses the source address information and one or more of the phone numbers for the source is blank, the system will retain the target phone number instead of removing it. *Example:* If the source has a day number, but not an evening number, the system will use the source day number, but retain the target evening number.
Primary email address	Uses the target's primary email address; however, the source's email addresses are added to the target's list.
Additional fields:	NA
Entry date	Compares target and source Entry date and uses earlier date.
Original mail type	If the target's original mail type is not *B* (buyer), uses the source's original mail type.
Current mail type	If the target has no order history (the Last order date field is blank), uses the source's current mail type.
Original source code	If the target is newer than the source based on the Entry date, uses the source information. However, if the source has the older Entry date but no original source code, then the target's original source code is retained.
Customer class	If the target is newer than the source based on the Active since date, uses the source information. (The Active since date is filled when the customer first places an order; if the customer has never placed an order, the Active since date is set to 99/99/99).
Mail Rent Seed	If any of these flags are *selected* for either the target or the source, sets the flag to *selected*.

Field	How Updated?
Hold/bypass/fraud Customer type Discount percent Price column Pop-up windows Alternate customer number Salesman number Country Mail code Call code Pop-up windows VAT number Currency code Language code Price Group Reserve warehouse	For any of these fields, if the source has information in the field and the target does not, uses the source information; otherwise, use the target information.
Tax status (tax code) Tax identification number	If the source has a tax identification number and the target does not, uses the tax identification number and tax exempt status.
Track item history Item history tracking level	If the Track item history field is set to *Sold to tracking* or *Sold to/ship to tracking* for the source but not the target, uses the Item history tracking setting from the source.
Current source code	Uses the last source code used by either the source or the target from the Customer Sold To Order History table.
External sales amount External sales update date	Uses the target customer's External sales amount and External sales update date unless the source customer's External sales update date is more recent, or the target customer has no external sales information; in either of these cases, the target customer record is updated with the source customer's external sales information.
Inactive flag Commercial flag Bypass reservation flag Auto cancel backorder flag Associate flag Bill-to customer number	Uses the target information.
Life to date warranty dollars	If the source customer has a dollar amount defined and the target customer does not, the system uses the dollar amount defined for the source customer. If a value has been defined in the Life to date warranty dollars field in the Customer Sold To Order History table for both the source customer and the target customer, the system adds the two values together.

Field	How Updated?
Relate Id	If: • the target customer has a Relate Id, do not change it, regardless of whether a source customer also has a Relate Id. • the source customer has a Relate Id and the target does not, the system uses the source customer's Relate Id. • multiple source customers have Relate Ids and the target does not, the system uses the Relate Id for the first customer who has one.
Synchronize with remote	If any of the source customers have this flag set to Y, the system sets this flag to Y for the target customer.

E-Commerce Customer Merge Web XML File (CustomerMergeWeb)

Purpose: The E-Commerce Customer Merge Web XML file (CustomerMergeWeb) contains customer sold to merge information as a result of *Performing a Merge* in *Working with Merge/Purge Sold-to Names (MMCS)*. The system generates this file if the Generate E-Commerce Customer Merge Staging Files (H86) system control value is selected, based on records in the EC Cust Sold To Merge table. Once the system generates the CustomerMergeWeb file, the system clears the records in the EC Cust Sold To Merge table.

Name of file: The name of the file is `CustomerMergeWeb_999_YYMMDDHHMMSS.xml`, where `999` is the company code where you processed the customer merge and `YYMMDD` is the date and time when the file was created.

File storage API exports: If the Generate E-Commerce Customer Merge Staging Files (H86) system control value is selected, the merge/purge program creates a zip file in the OMS-ECOMMERCE container of the FILE_STORAGE table. The zip file contains the E-Commerce Customer Merge Web XML file. You can use the file storage API to download the file. See the File Storage API for background.

Application log: The system writes any messages related to the customer merge download to the *Application Log*.

Sample message: See the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1) for a message layout and sample message.

Clearing Customer Sold To Status (MCST)

Purpose: When you delete a customer from a merge/purge at the *Work with Source Customers Screen*, the system flags the customer with a Status of *M*. Once flagged with this status, a customer is not included the next time you generate a merge/purge list. Use the Clear Customer Sold To Status menu option to clear a Status of *M* for all records in the Customer file, so they will be eligible for subsequent merge/purge list generation.

Note:

- The Status field is not displayed on a screen.
- This menu option does not clear other values in the Status field.

For more information: See *Working with Merge/Purge Sold-to Names (MMCS)* for background.

Confirm Clear of Customer Status Window

How to display this window: Enter *MCST* in the Fast path field at the top of any menu, or select Clear Customer Sold To Status from a menu.

Completing this window: Click *OK* to clear each setting of *M* in the Status field of the Customer Sold To file for your company. The system resets the Status field from *M* to blank, and the customer is eligible to be selected the next time you generate a merge/purge list as described under *Submit Generation Window (Generating a List)*.

10 Merchandising

Setting Up the Item Supporting Tables

Supporting tables: This part describes how to set up the item supporting tables. Generally, these tables contain codes and associated descriptions which you use to define and classify items.

- Working with Hazardous Item Codes (WHAZ) describes creating, changing, deleting, and displaying these codes.
- Working with Item Category Codes (WITG) describes creating, changing, deleting, and displaying these codes.
- Working with Item Classes (WICL) describes creating, changing, deleting, and displaying these codes.
- Working with Item Status (WIST) describes creating, changing, deleting, and displaying these codes.
- Working with Long SKU Classes (WLSC) describes creating, changing, deleting, and displaying these codes.
- Working with Long SKU Departments (WLSD) describes creating, changing, deleting, and displaying these codes.
- Working with Units of Measure (WUOM) describes creating, changing, deleting, and displaying these codes.
- Working with Item Subscriptions (WISB) describes creating, changing, deleting, and displaying subscription items.
- Working with Item Keywords (WKEY) describes creating, changing, and deleting keywords you can use when scanning for an item.

- Working with Item Keyword Exclusions (WEXC) describes creating, changing, and deleting words you can exclude from automatic keyword creation.
- *Working with Tax Product Code Cross References (WTPC)* describes how to set up a cross reference table to map tax product codes to an item class, long SKU division, long SKU department, and long SKU class combination.

Working with Hazardous Item Codes (WHAZ)

Hazard codes identify hazardous items and indicate if special storage and/or handling is required. You assign a *Hazard code* to an item in Work with Item/SKUs.

In this topic:

- *Work with Hazard Codes Screen*
- *Create Hazard Code Screen*

Work with Hazard Codes Screen

How to display this screen: Enter *WHAZ* in the Fast path field at the top of any menu or select Work with Hazardous Item Codes at a menu.

Field	Description
Code	A code that identifies the hazard type. Numeric, 2 positions; optional.
Description	The description of the hazard code. Alphanumeric, 40 positions; optional

Screen Option	Procedure
Create a new code	Select *Create* to advance to the *Create Hazard Code Screen*.
Change a hazard code	Select *Change* for a hazard code to advance to the Change Hazard Code screen. At this screen, you can change any information except the hazard code. See *Create Hazard Code Screen* for field descriptions.

Screen Option	Procedure
Delete a hazard code	Select *Delete* for a hazard code to delete it. **Note:** You can delete a code even if it is assigned to an item. The next time you maintain the item, a message similar to the following indicates that the hazard code assigned to the item does not exist: Hazard not found.
Display a hazard code	Select *Display* for a hazard code to advance to the Display Hazard Code screen. You cannot change any information on this screen. See *Create Hazard Code Screen* for field descriptions.

Create Hazard Code Screen

Purpose: Use this screen to create new hazard codes.

How to display this screen: At the *Work with Hazard Codes Screen*, select *Create*.

Field	Description
Code	A code used to categorize an item as a hazardous material that requires special storage and/or handling. You can assign hazard codes to an item through Work with Item/SKUs. Numeric, 2 positions. Create screen: required. Change screen: display-only.
Description	The hazardous materials description. Alphanumeric, 40 positions; required.
Class	A class of hazardous materials such as flammable or radioactive. These codes are assigned by the Department of Transportation (DOT). The Class field is used for information and reporting only. Alphanumeric, 15 positions; required.
Label type	The type of label that should be produced for this type of hazardous material. The label identifies the hazardous item as flammable or radioactive to warehouse personnel or shippers. The Label type field is used for information and reporting only. The system will not automatically print a label. Alphanumeric, 15 positions; required.

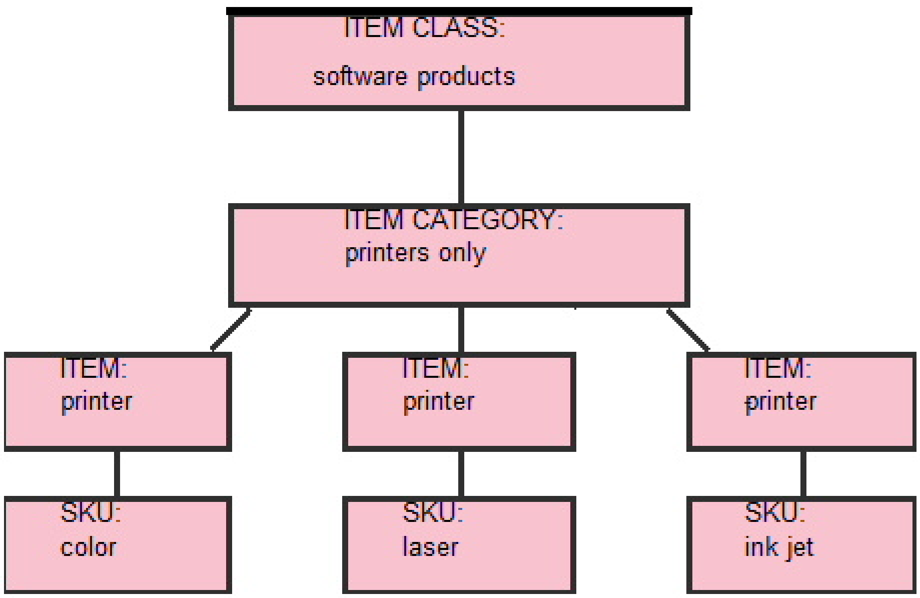
Working with Item Category Codes (WITG)

Item category codes classify and group similar items on a level below Item Class. For example, you can assign a group of items within the same item class an Item category of “printers only” to differentiate printers from the other items under that item class.

In this topic:

- *How Items are Classified and Grouped*
- *Work with Item Categories Screen*
- *Create Item Category Screen*

How Items are Classified and Grouped



Where you can use item category codes:

- Product relationship feature in Order Entry: see *Working with Items on the Order*.
- Inventory reports, such as the *Item Sales Analysis Report*, or the *Item Stock Status Report*
- Applying or excluding promotions; see *Working with Promotions (WPRO)*.

Work with Item Categories Screen

How to display this screen: Enter *WITG* in the Fast path field at the top of any menu or select Work with Item Categories at a menu.

Field	Description
Category	A code that identifies the item category. Alphanumeric, 4 positions in alphanumeric order; optional.
Description	The description of the item category. Alphanumeric, 30 positions; optional.

Screen Option	Procedure
Create a new code	Select *Create* to advance to the *Create Item Category Screen*.
Change an item category code	Select *Change* for an item category code to advance to the Change Item Category screen. At this screen you can change only the description. See *Create Item Category Screen* for field descriptions.
Delete an item category code	Select *Delete* for an item category code to delete it. **Note:** You can delete a code even if it is assigned to an item. The next time you maintain the item a message such as the following indicates that the code assigned to the item does not exist: `Item Category not found.`
Display an item category code	Select *Display* for an item category code to advance to the Display Item Category screen. You cannot change any information on this screen. See *Create Item Category Screen* for field descriptions.

Create Item Category Screen

Purpose: Use this screen to create new item category codes.

How to display this screen: At the *Work with Item Categories Screen*, select *Create*.

Instructions:

Field	Description
Cat (Category)	A code that classifies items that are related to, or compatible with each other. You can assign an *Item category* to an item in Work with Item/SKUs. Alphanumeric, 4 positions. Create screen: required. Change screen: display-only.
Description	The description of the item category. Alphanumeric, 30 positions; required.

Working with Item Classes (WICL)

Purpose: Use item class codes to group items for inventory and demand reporting. For example, you can use item class to:

- select which items or SKUs to copy from one offer to another: see *Copying SKU Offer Information (MCSO)*
- override item offer or SKU offer information: see *Working with Offer Overrides by Item Class (WSOI)*
- identify a tax exemption for a group of items: see *Working with Item Tax Exemptions (WITX)*
- grouping items for inventory reporting: see *Performing Inventory Analyses*)
- design the templates used to present information in specific settings, such as order entry or on a web storefront: see *Entering Additional Item Information*)
- track demand by customer: see *Reviewing Customer History*)
- identify when to automatically download availability information to the web storefront: see *E-Commerce Interface*.

Uploading: You can use the *Submit Supporting Data Upload Screen (SDUP)* to upload new item class codes. See *Importing Item-Related Supporting Data (SDUP)* for an overview.

In this topic:

- *Work with Item Class Screen*
- *Create Item Class Screen*
- *Item Class Restrictions by Customer Class Screen (Working with Restrictions)*
- *Restrict Item Class by Customer Class (Creating a Restriction)*
- *Work with Item Restrictions by City Screen (Defining City/State Restrictions)*
- *Create Item Restriction by City Screen*
- *Special Handling Restrictions by Item Class Screen*
- *Restrict Special Handling by Item Class Screen*

Work with Item Class Screen

How to display this screen: Enter *WICL* in the Fast path field at the top of any menu or select Work with Item Class from a menu.

Field	Description
Class	A code that identifies the item class. Alphanumeric, 3 positions; optional.
Description	The description of the item class. Alphanumeric, 30 positions; optional.

Screen Option	Procedure
Create an item class code	Select *Create* to advance to the *Create Item Class Screen*.
Change an item class code	Select *Change* for an item class code to advance to the Change Item Class screen. On this screen, you can change any information except the item class. See *Create Item Class Screen*.

Screen Option	Procedure
Delete an item class code	Select *Delete* for an item class code to delete it. **Note:** You can delete an item class code even if it is assigned to an item. The next time you maintain the item you will receive a message indicating that the code assigned to the item is not found.
Display an item class code	Select *Display* for an item class code to advance to the Display Item Class screen. You cannot change any information on this screen. See *Create Item Class Screen* for field descriptions.
Define a customer class restriction	Select *Cust Class Restric* for an item class code to advance to the *Item Class Restrictions by Customer Class Screen (Working with Restrictions)*.
Define a city restriction	Select *City/State Restrict.* for an item class code to advance to the *Work with Item Restrictions by City Screen (Defining City/State Restrictions)*.
Work with special handling restrictions	Select *Special Handling Restrict.* for an item class code to advance to the *Special Handling Restrictions by Item Class Screen*.

Create Item Class Screen

Purpose: Use this screen to create an item class.

How to display this screen: Select *Create* at the *Work with Item Class Screen*.

Field	Description
Item Class	A code to identify a group of items, such as computer hardware or computer software. Item Class codes are used as a high-level method to sort and classify inventory. You assign an item *Class* to an item in the Item table. Alphanumeric, 3 positions. Create screen: required. Change screen: display-only.
Description	A description of the item class, such as furniture or computer hardware. The item class description prints on several inventory reports. Alphanumeric, 30 positions; required.

Field	Description
Commission %	Not currently implemented. Numeric, 5 positions with a 2 place decimal; optional.
Estimate freight	Your “best guess” on the vendor's freight charges for items defined in this item class. This unit amount is added to an item's cost to represent the estimated freight charges. Including estimated freight charges is helpful if you sell merchandise before the actual freight charges are known. The system includes estimated freight in the cost of an item when determining gross profit in order entry, maintenance, inquiry and item availability. Gross profit margin is the amount of the item's price that exceeds your cost of the item. You can use gross margin to determine the profit of an item on an order based on the item's selling price, or to determine the profit of an entire order. See *Determining Gross Profit* for more information. Numeric, 7 with a 2-place decimal; optional.
Estimated freight %	Your “best guess” on the vendor's freight charges for items defined in this item class. This percentage amount is added to an item's cost to represent the estimated freight charges. Including estimated freight charges is helpful if you sell merchandise before the actual freight charges are known. The system includes estimated freight in the cost of an item when determining gross profit in order entry, maintenance, inquiry and item availability. Gross profit margin is the amount of the item's price that exceeds your cost of the item. You can use gross margin to determine the profit of an item on an order based on the item's selling price, or to determine the profit of an entire order. See *Determining Gross Profit* for more information. Numeric, 13 positions with a 2-place decimal; optional.
Availability threshold (item class-level)	Use this field to indicate when to trigger an automatic download of item availability information through the generic inventory API. The system creates a trigger record for an item when its available quantity breeches the threshold, and an integration layer process generates the *Inventory Download XML Message (CWInventoryDownload)* message to send inventory information to an external system. See *Generic Inventory Download API* in the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1) for an overview of message generation rules and processing. **Availability threshold hierarchy:** The system checks this setting if there is no *Avail thrshld (Item-level availability threshold)* specified for the individual item. If both the item-level or item class-level thresholds are blank, the system checks the *Quantity Available Threshold for Inventory Downloads (G36)* system control value. See this system control value for a complete description of how the availability threshold hierarchy works, and for a description of the e-commerce download. Numeric, 5 positions; optional.

Item Class Restrictions by Customer Class Screen (Working with Restrictions)

Purpose: Item class restriction by customer class is used to prevent the sale of an item to certain customers. For example, if you sell lethal weapons you will need to restrict customers who are under 21 years of age from purchasing them. By creating and using customer class restrictions, you can prevent a class of customers from ordering a class of items. When you define a customer class restriction for an item class, the system:

- displays a message in Order Entry informing you that a particular item is restricted for a certain class of customer
- does not allow you to enter the item on an order for that class of customer

Use this screen to create and delete customer class restrictions.

How to display this screen: At the *Work with Item Class Screen*, select *Customer Class Restriction* for an item class.

Field	Description
Item class	The item class for which you are creating a customer class restriction. Item class code: alphanumeric, 3 positions; display-only. Item class description: alphanumeric, 30 positions; display-only.
Customer class	A code that identifies a class of customers such as for an item restriction, list selection, or reporting purposes. Alphanumeric, 2 positions; optional.

Screen Option	Procedure
Create a new restriction by customer class	Select *Create* to advance to the *Restrict Item Class by Customer Class (Creating a Restriction)*.
Delete a restriction by customer class	Select *Delete* for a customer class restriction to delete it.

Restrict Item Class by Customer Class (Creating a Restriction)

Purpose: Use this screen to restrict a customer class from ordering a specific item class.

How to display this screen: Select *Create* at the *Item Class Restrictions by Customer Class Screen (Working with Restrictions)*.

Field	Description
Item class	The item class code and description for which you wish to create a customer class restriction. Item class code: alphanumeric, 3 positions; display-only. Item class description: alphanumeric, 30 positions; display-only.
Customer class	The customer class code you wish to restrict from a specific item class. Customer Class codes are defined in and validated against the Customer Class table. See *Setting Up the Customer Class Table (WCCL)*. Numeric, 2 positions; required.

Work with Item Restrictions by City Screen (Defining City/State Restrictions)

Purpose: Item class restrictions by city/state prevent the sale of certain items where it is illegal for them to be sold. For example, it is illegal to sell lethal sprays in Massachusetts. By creating and using City/State restrictions, you can prevent customers in a certain location from ordering a class of items. When you define a city/state restriction for an item class, the system:

- displays a message in Order Entry indicating that the item is restricted for the location
- does not allow you to enter the item on an order for that city/state

How to display this screen: At the *Work with Item Class Screen*, select *City/State Restriction* for an item class.

Field	Description
Item class	The item class code and description for which you are creating a city restriction. Item class: Alphanumeric, 3 positions; display-only. Item class description: Alphanumeric, 30 positions; display-only.
City	The city where an item class restriction applies. Alphanumeric, 25 positions; optional.
State	The two-letter code for the state or province where the city is located. Alphanumeric, 2 positions; optional.

Screen Option	Procedure
Create a new restriction by city	Select *Create* to advance to the *Create Item Restriction by City Screen*.
Delete a restriction by city	Select *Delete* for a city/state restriction to delete it.

Create Item Restriction by City Screen

Purpose: Use this screen to restrict a city from a specific item class.

How to display this screen: At the *Work with Item Restrictions by City Screen (Defining City/State Restrictions)*, select *Create*.

Field	Description
Item class	The item class code and description for which you are creating a city restriction. Item class code: alphanumeric, 3 positions; display-only. Item class description: alphanumeric, 30 positions; display-only.
City	The city where an item class restriction applies. Alphanumeric, 25 positions; required.
State	The two-letter code for the state or province. State codes are defined in and validated against the State table, which is accessible through the Work with Countries menu option; see *Setting Up the Country Table (WCTY)*. Alphanumeric, 2 positions; required.

Special Handling Restrictions by Item Class Screen

Purpose: Use this screen to restrict the type of special handling that a customer can order based on item class. For example, you might want to restrict personalizing a t-shirt with an emblem if the process used to attach the emblem damages the t-shirt.

A message similar to the following indicates when you define a special handling code for an item assigned to a restricted item class:

Additional charge code (EM) cannot be used with this item class (RST).

How to display this screen: At the *Work with Item Class Screen*, select *Special Handling Restriction* for an item class.

Field	Description
Item class	The item class code and description that is restricted from special handling. Item class code: alphanumeric, 3 positions; display-only. Item class description: alphanumeric, 30 positions; display-only.
S/H code (Special handling code)	The code for the type of special handling that is restricted. Special handling codes are defined in and validated against Work with Additional Charges (fast path = *WADC*); see *Establishing Additional Charge Codes (WADC)*. Alphanumeric, 2 positions; optional.
Description (Special handling code description)	The description of the type of special handling that is restricted. Alphanumeric, 30 positions; display-only.

Screen Option	Procedure
Delete a special handling restriction	Select *Delete* for the special handling restriction to delete it.
Create a special handling restriction	Select *Create* to advance to the *Restrict Special Handling by Item Class Screen*.

Restrict Special Handling by Item Class Screen

Purpose: Use this screen to restrict special handling codes from being used by an item class.

How to display this screen: On the *Special Handling Restrictions by Item Class Screen*, select *Create*.

Field	Description
Item class	The item class code and description for which you are creating a special handling restriction. Item class code: alphanumeric, 3 positions; display-only. Item class code description: alphanumeric, 30 positions; display-only.
S/H code (Special handling code)	The special handling code you wish to restrict for this item class. Alphanumeric, 2 positions; required.

Working with Item Status (WIST)

Purpose: Use the Work with Item Status Codes function to define an item status such as obsolete, discontinued, future ship or soldout, which you can then use for:

- selecting items for inventory inquiries and reports
- displaying message lines in Order Entry and Order Maintenance
- assigning a future arrival date
- controlling the display of the item

Assigning to an item: You use the Status field on the first *Create Item Screen* or Change Item screen to assign a status code to an item. If the item has SKUs, you can also assign a status to the individual SKUs. The SKU status overrides the status of the base item.

Future arrival date: You can default a future ship arrival date to an item in order entry through the *Future Orders Item Status (E52)* system control value. The date defaults from the *Default Future Orders Arrival Date (E53)* system control value.

Grouping items: The item status code is one of several types of codes you can use to define and group items. Other codes include department, item class, item category, long SKU class, and long SKU department. See *Performing Initial Item Entry (MITM)* for information on assigning these codes to items.

Preventing display at the Item Selection screen: The Item Selection screen does not list Items that are assigned to the *Item Status for Suppressing Item During Item Selection (L21)*, provided the status is assigned at the item level rather than the SKU level.

Uploading: You can use the *Submit Supporting Data Upload Screen (SDUP)* to upload new item status codes. See *Importing Item-Related Supporting Data (SDUP)* for an overview.

In this topic:

- *Work with Item Status Screen*
- *Create Item Status Screen*

Work with Item Status Screen

How to display this screen: Enter *WIST* in the Fast Path field at the top of any menu or select Work with Item Status from a menu.

Field	Description
Sts (Status)	A code that identifies the item status. Alphanumeric, 1 positions; optional.
Description	The description of the item status. Alphanumeric, 30 positions; optional.

Screen Option	Procedure
Create a new code	Select *Create* to advance to the *Create Item Status Screen*.
Change an item status code	Select *Change* for a code to advance to the Change Item Status screen. At this screen, you can change any information except the code. See *Create Item Status Screen* for field descriptions.
Delete an item status code	Select *Delete* for a code to delete it. **Note:** You can delete a code even if it is assigned to items. The next time you maintain any items associated with this status code a message will display indicating that the code assigned to the item is not found.
Display an item status code	Select *Display* for a code to advance to the Display Item Status Screen. You cannot change any information on this screen. See *Create Item Status Screen* for field descriptions.

Create Item Status Screen

To create: At the *Work with Item Status Screen*, select *Create*.

Field	Description
Status	A code that represents an item's status, such as obsolete, discontinued, soldout, etc. You can use item status codes as selection criteria for inventory reporting or to create status message lines to display in Order Entry or Order Maintenance. Alphanumeric, 1 position. Create screen: required. Change screen: display-only.
Description	A description of the item status code. Alphanumeric, 30 positions; required.
O/E message 1 and 2	The two message lines to display in the *Item Status Message Window* in Order Entry and Order Maintenance for items with this status code. Alphanumeric, two lines of 50 positions each; optional.

Field	Description
Return disposition	A code that identifies how a returned item assigned to this item status code will be handled by the system, in terms of whether the return updates inventory and the warehouse and location to which the item will be returned. **Note:** When you return an item that is assigned to an item status code that has a return disposition code defined, the system does not default the return disposition code to the return. Return disposition codes are defined in and validated against the Return Disposition table. Alphanumeric, 2 positions; optional.

Working with Long SKU Classes (WLSC)

Purpose: Long SKU classes represent class codes for a SKU. For example, you may want to assign a long SKU class code to items that differ from the mail order class codes for the same group of items. These codes are typically used in a retail environment; however, they can be used for other classifications.

Long SKU Class codes are used in conjunction with Long SKU Department codes for reporting purposes. A long SKU class is assigned to an item in the *L/S class (Long SKU class)* field of the Item table; the system will validate your entry to this field against the Long SKU Class table.

Retail integration (external system to Order Administration): If you are using Retail Integration (external system to Order Administration) by *selecting* the *Use Retail Integration (H26)* system control value, you define a retail class within the long SKU department assigned to an item rather than a using a long SKU class. For example, retail class 10 might be Ties within Department 20 (Men's Apparel), but within Department 30 (Women's Apparel) class 10 might be Slacks.

As a result, when you are using the Retail Integration (external system to Order Administration), the system validates retail classes against the Retail Class table and denies access to the Work with Long SKU Class menu option. If you attempt to use the menu option, the screen displays an error message: `Work with Long SKU Class Not Allowed with SCV H26.`

Require long SKU class: If the *Require L/S Class (I93)* system control value is selected, the system requires you to enter a long SKU class when you create or maintain an item.

Long SKU elements: The entire Long SKU consists of the following elements:

- L/S Style
- L/S Vendor
- L/S Department

- L/S Class
- L/S Color
- L/S Size
- L/S Width

If the *Use Retail Integration (H26)* system control value is selected, the system requires you to enter a L/S style, L/S subclass, L/S department, and L/S class when you create or maintain an item.

Uploading: If the *Use Retail Integration (H26)* system control value is unselected, you can use the *Submit Supporting Data Upload Screen (SDUP)* to upload new long SKU class codes. See *Importing Item-Related Supporting Data (SDUP)* for an overview.

In this topic:

- *Work with Long SKU Classes Screen*
- *Create Long SKU Class Screen*

Work with Long SKU Classes Screen

How to display this screen: Enter *WLSC* in the Fast Path field at the top of any menu or select Work with Long SKU Classes from any menu.

Field	Description
Class	A code that represents the long SKU class. Numeric, 4 positions; optional.
Description	The description of the long SKU class. Alphanumeric, 30 positions; optional.

Screen Option	Procedure
Create a new long SKU class	Select *Create* to advance to the *Create Long SKU Class Screen*.
Change a long SKU class	Select *Change* for a long SKU class to advance to the Change Long SKU Class Screen. At this screen you can change any information except the long SKU class code. See *Create Long SKU Class Screen* for field descriptions.
Delete a long SKU class	Select *Delete* for a long SKU class to delete it.

> **Note:**
>
> You can delete a code even if it is assigned to an item. The next time you maintain the item you will receive a message indicating that the code assigned to the item is not found.

Screen Option	Procedure
Display a long SKU class	Select *Display* for a long SKU class to advance to the Display Long SKU Class Screen. You cannot change any information on this screen. See *Create Long SKU Class Screen* for field descriptions.

Create Long SKU Class Screen

Purpose: Use this screen to create a long SKU class.

How to display this screen: At the *Work with Long SKU Classes Screen*, select *Create*.

Field	Description
Class	A user-defined code that defines the long SKU class. Long SKU Class codes are used in conjunction with Long SKU Department codes for reporting purposes. Numeric, 4 positions. Create screen: required. Change screen: display-only.
Description	The description of the long SKU class code. Alphanumeric, 30 positions; required.

Working with Long SKU Departments (WLSD)

Purpose: Use the Work with Long SKU Departments menu option to create or work with department codes for a SKU, or if you are using Retail Integration (external system to Order Administration), to assign a retail class code to a long SKU department. For example, you might want to use a long SKU department code that differs from the mail order department codes you assign to a group of items. These codes are typically used in a retail environment; however, they are sometimes used for other classifications.

Long SKU department codes are used in conjunction with long SKU class codes for reporting purposes and to create a hierarchy within a company or entity. If you have the *Require Long SKU Division with Long SKU Department (E85)* system control value *selected*, you must specify a long SKU division when creating or maintaining long SKU departments.

Retail integration (external system to Order Administration): If you are using Retail Integration (external system to Order Administration), long SKU class codes are linked to long SKU department codes to create retail classes. See the *Work with Retail Class Screen*.

A long SKU department is assigned to an item in the *L/S dept (Long SKU department)* field of the Item table; the system will validate your entry to this field against the Long SKU Department table.

Require long SKU department: If the *Require L/S Department (I92)* system control value is selected, the system requires you to enter a long SKU department when you create or maintain an item.

Long SKU elements: The entire Long SKU consists of the following elements:

- L/S Style
- L/S Vendor
- L/S Department
- L/S Class
- L/S Color
- L/S Size
- L/S Width
- L/S Subclass

If the *Use Retail Integration (H26)* system control value is selected, the system requires you to enter a L/S style, L/S subclass, L/S department, and L/S class when you create or maintain an item; also, it is possible to assign a retail class to a long SKU department.

Uploading: Options include:

- *Importing Enterprise Foundation Data through Omnichannel Cloud Data Service (OCDS)*
- *Importing Item-Related Supporting Data (SDUP)*

In this topic:

- *Work with Long SKU Departments Screen*
- *Create Long SKU Department Screen*
- *Work with Retail Class Screen*
- *Create Retail Class Screen*

Work with Long SKU Departments Screen

How to display this screen: Enter *WLSD* in the Fast Path field at the top of any menu or select Work with Long SKU Department from a menu.

> **Note:**
>
> The *Assign Retail Class* option is not available if the *Use Retail Integration (H26)* system control value *unselected*.

Field	Description
Dept. (Department)	A code that represents the long SKU department. Numeric, 4 positions; optional.
Description	The description of the long SKU department. Alphanumeric, 30 positions; optional.

Field	Description
Division	The division associated with the long SKU department. Not validated by any Order Administration table, but can be used for sorting purposes on reports. **Note:** The *Importing Item-Related Supporting Data (SDUP)* and *Working with Retail Integration Item Upload (RIIU)* options support a maximum of 3 positions for the long SKU division code. Alphanumeric, 4 positions; display-only.

Screen Option	Procedure
Create a new long SKU department	Select *Create* to advance to the *Create Long SKU Department Screen*.
Change a long SKU department	Select *Change* for a long SKU department to advance to the Change Long SKU Department screen. At this screen, you can change any information except the long SKU department code. See *Create Long SKU Department Screen* field descriptions.
Delete a long SKU department	Select *Delete* for a long SKU department to delete it. **Note:** You can delete a code even if it is assigned to an item. The next time you maintain the item you will receive a message indicating that the code assigned to the item is not found.
Display a long SKU department	Select *Display* for a long SKU department to advance to the Display Long SKU Department Screen. You cannot change any information on this screen. See *Create Long SKU Department Screen* for field descriptions.

Screen Option	Procedure
Assign a long SKU department to a retail class	Select *Assign Retail Class* for a long SKU department to advance to the *Work with Retail Class Screen*. This option is available only if you have the *Use Retail Integration (H26)* system control value *selected*.

Create Long SKU Department Screen

Purpose: Use this screen to create a long SKU department.

How to display this screen: Select *Create* at the *Work with Long SKU Departments Screen*.

Field	Description
Department	A user-defined code that identifies a long SKU department. Long SKU department codes are used in conjunction with long SKU class codes for reporting purposes. Numeric, 5 positions. Create screen: required. Change screen: display-only.
Description	The description of the long SKU department code. Alphanumeric, 30 positions; required.
L/S division (Long SKU division)	The code identifying the long SKU division. Long SKU divisions are defined in and validated against the Long SKU Division table. You use the division code to establish a hierarchy and to sort item information when you generate reports. See *Creating and Maintaining Long SKU Divisions (WLDV)*. Required if the *Require Long SKU Division with Long SKU Department (E85)* system control value is *selected*. **Note:** The *Importing Item-Related Supporting Data (SDUP)* and *Working with Retail Integration Item Upload (RIIU)* options support a maximum of 3 positions for the long SKU division code. Alphanumeric, 4 positions; required if system control value is *selected*.

Work with Retail Class Screen

Purpose: Use this screen to create, change, delete or display a retail class within the long SKU department.

The creation and assignment of retail classes is part of integrating retail operation into Order Administration and is controlled through the *Use Retail Integration (H26)* system control value. A retail class is a long SKU class that you have assigned to a specific long SKU department. You can create retail classes either through this screen by selecting *Create* or through a Retail Class File conversion program.

How to display this screen: If the *Use Retail Integration (H26)* system control value is selected, select *Assign Retail Class* for a long SKU department at the *Work with Long SKU Departments Screen*.

Field	Description
L/S Department	The code and description of the long SKU department to which you will assign a long SKU class. Long SKU departments are linked with long SKU classes in Retail Integration (external system to Order Administration) for creating an organizational hierarchy and for reporting purposes. Department code: Numeric, 4 positions; display-only. Department description: Alphanumeric, 30 positions; display-only.
Class	A code that represents a retail class. A long SKU class that is assigned to a long SKU department is called a retail class. Retail classes are department specific whereas regular long SKU classes are unique and remain constant across departments. For example, Retail Class 10 may be Ties within Department 20 (Men's Apparel), but within Department 30 (Women's Apparel) Retail Class 10 may be Slacks. With regular long SKU classes, Class 15 may be Shoes, and will remain Shoes regardless of the department. Retail classes are defined in and validated against the Retail Class table whereas long SKU classes are defined in and validated against the Long SKU Class table. Therefore, when the *Use Retail Integration (H26)* system control value is *selected*, you can not access the Work with Long SKU Class menu option or the *WLSC* fast path. Numeric, 4 positions; optional.
Description	The description of a retail class. If you ran the Retail Class Table conversion program to populate the Retail Class table, the existing long SKU class description defaults for the retail class description. Alphanumeric, 30 positions, optional.

Option	Procedure
Create a retail class	Select *Create* to advance to the *Create Retail Class Screen*.
Change a retail class	Select *Change* for a retail class to advance to the Maintain Retail Class Screen. At this screen you can change the description for a retail class. If you want to change the retail class code (L/S Class), you must delete (*Delete*) the existing code and create (*Create*) a new retail class code. See *Create Retail Class Screen* for field descriptions.

Option	Procedure
Delete a retail class	Select *Delete* for a retail class to delete it. **Note:** You can delete a code even if it is assigned to an item. The next time you maintain the item you will receive a message indicating that the code assigned to the item is not found within the long SKU department.
Display a retail class	Select *Display* for a retail class to advance to the Display Retail Class Screen. You can not change any information on this screen. See *Create Retail Class Screen* for field descriptions.
Print a list of retail classes	Select *Print List* to print a list of the retail class(es) assigned to the long SKU department. The system submits the job *RETAIL_CLS*.

Create Retail Class Screen

Purpose: Use this screen to create a retail class within the particular long SKU department.

How to display this screen: Select *Create* at the *Work with Retail Class Screen*.

Field	Description
L/S Department	The code and description of the long SKU department to which you will assign a long SKU class. Long SKU departments are used with long SKU classes in Retail Integration (external system to Order Administration) to create an organizational hierarchy and for reporting purposes. Department code: Numeric, 4 positions; display-only. Department description: Alphanumeric, 30 positions; display-only.

Field	Description
L/S Class (Long SKU Class)	A code that represents a retail class. A long SKU class that is assigned to a long SKU department is called a retail class. Retail classes are department-specific, while regular long SKU classes are unique and remain constant across departments. For example, Retail Class 10 might be Ties within Department 20 (Men's Apparel), but within Department 30 (Women's Apparel) Retail Class 10 might be Slacks. With regular long SKU classes, Class 15 might be Shoes, and remain Shoes regardless of the department. Retail classes are defined in and validated against the Retail Class table, while long SKU classes are defined in and validated against the Long SKU Class table. As a result, when the *Use Retail Integration (H26)* system control value is *selected*, you can not access the Work with Long SKU Class menu option. Numeric, 4 positions; required.
Retail Class Description	The description of a retail class. If you ran the Retail Class Table conversion program to populate the Retail Class table, the existing long SKU class description defaults for the retail class description. Alphanumeric, 30 positions, required.

Completing this screen: Enter the L/S Class (Retail Class) code and Retail Class Description and select *OK*. The system clears the fields and indicates: `Retail Class (xxx) created.`

Working with Units of Measure (WUOM)

Purpose: Use this option to defines the standard units of measure by which items are purchased and sold. Typical units of measure include cases, pounds, dozens, and "eaches." You define a unit of measure for each item in the Item and Vendor Item tables.

After setting up units of measure, use *Working with Unit of Measure Conversions (WUMC)* to set up conversions so that units and costs calculate correctly in PO Maintenance and PO Receipts.

In this topic:

- *Work with Units of Measure Screen*
- *Create Unit of Measure Screen*

Work with Units of Measure Screen

How to display this screen: Enter *WUOM* in the Fast Path field in the top of any menu or select this option from a menu.

Field	Description
UOM (Unit of measure)	A code that represents the unit of measure. Alphanumeric, 3 positions; optional.
Description	The description of the unit of measure. Alphanumeric, 30 positions; optional.

Field	Description
Units	The number of units (single items) represented by this unit of measure, such as 12 units in a case. Numeric, 4 positions; optional.

Screen Option	Procedure
Create a new unit of measure	Select *Create* to advance to the *Create Unit of Measure Screen*.
Change a unit of measure	Select *Change* for a unit of measure to advance to the Change Unit of Measure screen. At this screen you can change any information except the unit of measure. See *Create Unit of Measure Screen* for field descriptions.
Delete a unit of measure	Select *Delete* for a unit of measure to delete it. **Note:** You can delete a unit of measure even if it is assigned to an item. The next time you maintain the item you will receive a message indicating that the unit of measure assigned to the item is not found.
Display a unit of measure	Select *Display* for a unit of measure to advance to the Display Unit of Measure Screen. You cannot change any information on this screen. See *Create Unit of Measure Screen* for field descriptions.

Create Unit of Measure Screen

To create: At the *Work with Units of Measure Screen*, select *Create*.

You must create units of measure before working with unit of measure conversions. See *Working with Unit of Measure Conversions (WUMC)*.

Field	Description
Unit of measure	A code that represents a unit of measure for an item. Typical units of measure include: *EA* - each *IN* - inches *C12* - case of 12 Alphanumeric, 3 positions. Create screen: required. Change screen: display-only.

Field	Description
Description	A description of the vendor unit of measure such as each, 12 cases, or inches. Alphanumeric, 30 positions; required.
Units	The number of units (single items) represented by this unit of measure, such as 12 units in a case. Numeric, 4 positions; optional.

Working with Item Subscriptions (WISB)

Purpose: Use the Item Subscriptions function to define the particulars of a subscription item you sell to your customers. You must define a record in this table for each subscription item you create.

Overview: Defining and selling subscriptions through Order Management System involves the following process:

- *Define the subscription in the Item table. Select* the Subscription field and the Non/inv (non-inventory item) field. See *Performing Initial Item Entry (MITM)*.
- *Define the subscription in the Item Subscription table*.
- *Enter orders and pick slips*. You enter a subscription on an order as you do other items. When you accept the order, the system creates a separate pre-generated pick for the subscription item. When you generate pick slips for the order, the system bills the subscription item immediately and indicates on the pick slip that the subscription is shipping separately. See *Preparing Orders for Pick Slip Generation* and *Performing Pick Slip Generation* for more information on preparing and generating picks.
- *Generate the Subscription Extract file*. See *Generating the Subscription Extract Table (WGSE)* for information on creating a file of customers to receive subscription items.
- *Purge the Subscription Extract file*. Periodically, you can use the purge function to clear the file of closed or canceled subscriptions. You can also clear the file completely. See *Generating the Subscription Extract Table (WGSE)* for more information on purging subscription records or clearing the file.

You can also review, cancel, or change a specific customer's subscription information through the Work with Customers function and in standard Order Inquiry. See *Displaying More Options in OIOM*.

In this topic:

- *Work with Item Subscriptions Screen*
- *Create Item Subscription Screen*

Work with Item Subscriptions Screen

How to display this screen: Enter *WISB* in the Fast path field at the top of any menu or select this option from a menu.

Field	Description
Item	The item code that identifies the subscription. An item is designated as a subscription by a *selected* Subscription field of the Item (Base Information) record. Items are defined in and validated against the Item table. Alphanumeric, 12 positions.
Cur iss (Current issue number)	The number of the subscription that will be the first issue sent when the customer orders the subscription or the issue presently being mailed. Numeric, 3 positions.
# of int (Number of intervals)	The number of issues the customer should receive when purchasing the subscription. Numeric, 3 positions.
# of Days	The number of days between each issue. Numeric, 3 positions.
Orig item (Original item)	The original subscription item number associated with this subscription. This is used when a subscription item is offered with different intervals (such as a subscription with a multi-period offering). This is used so that the customer can extend the length of a subscription. *Example:* The customer purchased a year's subscription (item SUBSCR#1). Near the end of the subscription period, the customer calls back and orders another year's subscription (item SUBSCR#2). The system: 1. checks the Customer Subscription table to see if the original subscription (for SUBSCR#1) is still active (has not expired) 2. checks to see if there is a value in the Original item/SKU field in the Item Subscription record (SUBSCR#2, which was ordered, references original subscription item SUBSCR#1) 3. creates a Customer Subscription record for the original subscription item number (SUBSCR#1) and extends the original subscription for the period of the new subscription (in SUBSCR#2), after the initial subscription expires Items are defined in and validated against the Item table. **Note:** The system validates that the item number entered is a subscription item (Subscription = *Selected* and Non/inv = *Selected* for the item). Alphanumeric, 12 positions.

Screen Option	Procedure
Create a new item subscription	Select *Create* to display the *Create Item Subscription Screen*.

<table>
<tr><th>Screen Option</th><th>Procedure</th></tr>
<tr><td>Change an item subscription</td><td>Select Change for an item subscription to advance to the Change Item Subscription Screen. At this screen you can change any information except the subscription item code and description. See Create Item Subscription Screen for field descriptions.

Note:
Changing subscription information does not change existing subscriptions; however, new subscriptions will reflect these changes.</td></tr>
<tr><td>Delete an item subscription</td><td>Select Delete for an item subscription to delete it.

Note:
The system does not allow you to delete an item subscription if there are open subscriptions for the item. The system issues the following message if you attempt to delete an active subscription:

<code>Open subscriptions exist for this item -- cannot delete</code></td></tr>
<tr><td>Display an item subscription</td><td>Select Display for an item subscription to advance to the Display Item Subscription Screen. You cannot change any information on this screen. See Create Item Subscription Screen for field descriptions.</td></tr>
</table>

Create Item Subscription Screen

To create: At the *Work with Item Subscriptions Screen*, select *Create*.

> **Note:**
>
> You must create an Item Subscription for each subscription item you create in the Item table.

Field	Description
Item/SKU	The item code (optionally, the SKU) that identifies the subscription item. You designate an item as a subscription by *selecting* the Subscription and Non/inv fields of the Item table; see *Performing Initial Item Entry (MITM)*. The description of the item appears below the item/SKU at the Change Item Description screen, and is display-only. Item code: Alphanumeric, 12 positions. SKU: Three 4-position fields. Create screen: required. Change screen: display-only.
Current issue# (Current issue number)	The number of the subscription that will be the first issue sent when the customer orders the subscription or the number of the issue presently being mailed. Numeric, 3 positions; required.
Issue description	The description associated with the current issue of the subscription item. Alphanumeric, 25 positions; required.
# of intervals	The number of issues the customer should receive when purchasing the subscription item. Numeric, 3 positions; required.
Interval days	The number of days between each issue. Numeric, 3 positions; optional.
Original item/SKU	The original subscription item code associated with this subscription, if any. See the field description above for more information. Item code: alphanumeric, 12 positions; required. SKU: three 4-position fields; required.

Working with Item Keywords (WKEY)

Purpose: Use item keywords as a way to identify and scan for items other than by item number and item description. For example, if you sell books and the item number is a code, AN8975H, and the description is the title of the book, "The Outer Ring," you may want to use the author's name as a keyword: "Newbold." This way you can scan for items (books) that have been written by the author, instead of scanning for a specific item (by item code or the title of a specific book).

You can create as many keywords for an item as you want. For example, if you sell books and create the author's name as a keyword for each book, you could further define the item by creating a keyword for the type of book it is, for example, “Science Fiction.”

Web storefront: Keywords are included in the information you can download to the web storefront to make customers’ item searches easier. See *Downloading E-Commerce Offer Files (EOFR)*.

Retail integration (external system to Order Administration) item upload: If the *Auto-Generate Item Keywords from Description (F79)* system control value is selected, the system automatically creates keywords for items created or updated through the RI Item Upload process for record type *01* Item/SKU; see *Working with Retail Integration Item Upload (RIIU)*.

Note:

You can create item keywords only at the item level, not at the SKU level.

In this topic:

- *Generating Keywords During Item Entry*
- *First Work with Keywords for Item Screen*
- *Second Work with Keywords for Item Screen (ADD Mode)*
- *Work with Item Keywords Screen (WKEY)*
- *Create Item Keyword Screen*
- *Keyword Selection Screen (Scanning for Items Using Item Keywords)*

For more information: See *Working with Item Keyword Exclusions (WEXC)*.

Generating Keywords During Item Entry

Keyword creation/automatic advancement: There are two system control values that control automatic keyword creation and screen advancement at item entry:

SCV setting *Create Keywords at Item Entry (F78)*	*Auto-Generate Item Keywords from Description (F79)* SCV setting	Result when you create a new item
Selected	*Selected*	You advance to the *First Work with Keywords for Item Screen*. The system generates a keyword for each word in the item description.
Selected	*Unselected*	You advance to the *Second Work with Keywords for Item Screen (ADD Mode)*. The system has not created any keywords.
Unselected	*Selected*	You do not advance automatically to either of the Work with Keywords screens; however, the system generates a keyword for each word in the item description.
Unselected	*Unselected*	You do not advance automatically to either of the Work with Keywords screens, and the system does not generate keywords.

> **Note:**
>
> If system control value *Create Keywords at Item Entry (F78)* is *selected*, you first advance to the Create Vendor Item screen when you create an item; then, when you complete the Create Vendor Item screen, to the Work with Keywords for Item screen.

First Work with Keywords for Item Screen

Purpose:

- *During item entry:* Use this screen to review the keywords the system has created automatically, if any, and to delete or create keywords.
- *To work with keywords:* You can also use this screen at any time to review or delete existing keywords for an item, or create new keywords.

About item keywords: see *Working with Item Keywords (WKEY)* for an overview, and *Keyword Selection Screen (Scanning for Items Using Item Keywords)* for sample keyword selection when scanning for an item.

How to display this screen:

- depending on system control value settings, select *OK* on the Create Item (Base Information) screen in Work with Item/SKUs, or on the Create Vendor Item screen; see Generating Keywords During Item Entry
- select *Keywords* for an item at a *Work with Items Screen*
- select *Create* at the *Second Work with Keywords for Item Screen (ADD Mode)*

Field	Description
Item	The code and description for the item you are creating or working with. Item code: alphanumeric, 12 positions; display-only. Item description: alphanumeric, 120 positions; display-only.
Keyword	A word to further define an item. Item keywords are used to scan for a specific item based on information that is not found in the item code or item description. *During item entry:* Depending on your system control value settings, the system may automatically create a keyword using each word in the item description (see *Generating Keywords During Item Entry*). You can delete any unneeded keyword at this screen by selecting *Delete* for it. Alphanumeric, 20 positions; optional.

Screen Option	Procedure
Delete an item keyword	Select *Delete* for a keyword to delete it.
Add item keywords	Select *Create* to switch to the *Second Work with Keywords for Item Screen (ADD Mode)*.

Second Work with Keywords for Item Screen (ADD Mode)

Purpose: Use this screen to create item keywords.

About item keywords: see *Working with Item Keywords (WKEY)* for an overview, and *Keyword Selection Screen (Scanning for Items Using Item Keywords)* for sample keyword selection when scanning for an item.

How to display this screen:

- depending on system control value settings, select *OK* on the Create Item (Base Information) screen in Work with Item/SKUs; see Generating Keywords During Item Entry
- select *Create* at the *First Work with Keywords for Item Screen*

Field	Description
Item code	A user-defined code that represents a unit of inventory. Item codes are validated against the Item table. The item description appears to the right. Alphanumeric, 15 positions; display-only.
Keyword	A word to further define an item. Item keywords are used to scan for a specific item based on information other than the item code or item description. Alphanumeric, 20 positions; required.

Screen Option	Procedure
Create item keywords	Use each enterable line to enter a separate item keyword.
Review existing item keywords	Select *Display* to advance to the *First Work with Keywords for Item Screen*.

Work with Item Keywords Screen (WKEY)

Purpose: Use this screen to create, delete and review item keywords.

About item keywords: see *Working with Item Keywords (WKEY)* for an overview, and *Keyword Selection Screen (Scanning for Items Using Item Keywords)* for sample keyword selection when scanning for an item.

How to display this screen:

- enter *WKEY* in the Fast path field at the top of any menu or select this option from a menu, or
- select *Item Keywords* on the Item Support Maintenance pop-up window in Work with Item/SKUs

Field	Description
Keyword	A word to further define an item. Item keywords are used to scan for a specific item based on information other than the item code or item description. Alphanumeric, 20 positions; optional.

Field	Description
Item	A user-defined code that represents a unit of inventory. Item codes are validated against the Item table. Alphanumeric, 15 positions; optional.
Description	The description of the item. Alphanumeric, 120 positions; display-only.

Screen Option	Procedure
Delete an item keyword	Select *Delete* for the item keyword you wish to delete.
Create an item keyword	Select *Create* to advance to the *Create Item Keyword Screen*.

Create Item Keyword Screen

Purpose: Use this screen to create a keyword for an item.

How to display this screen: Select *Create* on the *Work with Item Keywords Screen (WKEY)*.

Field	Description
Item	A user-defined code that represents a unit of inventory. Item codes are validated against the Item table. Alphanumeric, 15 positions; required.
Keyword	A word to further define an item. Item keywords are used to scan for a specific item based on information other than the item code or item description. Alphanumeric, 20 positions; required.

Keyword Selection Screen (Scanning for Items Using Item Keywords)

Purpose: Use this screen to scan for an item by keyword and to then select the item. You would scan for an item by keyword if you did not know the item code or item description.

Example: You sell books. An item code is TB7528J, the item description is the title of the book, "Collective Thoughts." You do not know the item code or item description, only that the author of the book is Thomas Briggs and the book is a collection of his poems. You could scan for the item in order entry or order maintenance by the keyword *BRIGGS* or the keyword *POETRY*.

How to display this screen: On the Item Selection screen, selecting *Scan by Keyword*. You can advance to the Item Selection screen by *clicking* on an Item scan field. You also advance to this screen in order entry by prompting on the Item field if the *Auto-Generate Item Keywords from Description (F79)* system control value is *selected*.

Field	Description
Keyword	A word to further define an item. Item keywords are used to scan for a specific item using information other than the item code or item description. Alphanumeric, 20 positions; optional.
Item	A user-defined code that represents a unit of inventory. Item codes are validated against the Item table. Alphanumeric, 15 positions; optional.
Description	The description of the item. Alphanumeric, 120 positions; display-only.

Screen Option	Procedure
Select an item	*Select* an item keyword to select the item.
Switch to the Item Selection screen	Select *Scan by Description*.

Working with Item Keyword Exclusions (WEXC)

Purpose: Use Work with Keyword Exclusions to exclude certain words in the item description from being created as item keywords, if these words would not be useful for keyword scanning.

About item keywords: You can use item keywords as a way to identify and scan for an item other than by item number. For example, if you sell books and the item number is a code, AN8975H, and the description is the title of the book, “The Outer Ring,” you may want to use the author's name as a keyword: “Newbold.” This way you can scan for items (books) that have been written by the author, instead of scanning for a specific item (by item code or the title of a specific book).

When to use exclusions? The system automatically creates item keywords based on the words from the item's description if the *Auto-Generate Item Keywords from Description (F79)* system control value is *selected*. You might want to exclude words such as “the,” “with,” and “on” from being created as keywords; although these words might be part of an item descriptions, they would not be useful for scanning.

Related topic: See *Working with Item Keywords (WKEY)*, for more information on creating item keywords and scanning for an item using item keywords.

In this topic:

- *First Work with Keyword Exclusions Screen*
- *Second Work with Keyword Exclusions Screen*

First Work with Keyword Exclusions Screen

How to display this screen: Enter *WEXC* in the Fast path field at the top of any menu or select Work with Keyword Exclusions from a menu.

Field	Description
Exclusion	A word that has been excluded from automatically generating a keyword from the item's description when you create an item. The system automatically generates item keywords from the item's description when you create an item if the *Auto-Generate Item Keywords from Description (F79)* system control value is *selected.* Alphanumeric, 20 positions; optional.

Screen Option	Procedure
Delete a keyword exclusion	Select *Delete* for a keyword exclusion to delete it.
Create keyword exclusions	Select *Create* to advance to the *Second Work with Keyword Exclusions Screen*.

Second Work with Keyword Exclusions Screen

Purpose: Use this screen to create keyword exclusions.

How to display this screen: Select *Create* on the *First Work with Keyword Exclusions Screen*.

Field	Description
Exclusion	A word that has been excluded from automatically generating a keyword from the item's description when you create an item. The system automatically generates item keywords from the item's description when you create an item if the *Auto-Generate Item Keywords from Description (F79)* system control value is *selected.* The system displays 17 exclusion fields where you can enter words to exclude when creating keywords automatically. Alphanumeric, 20 positions; optional.

Screen Option	Procedure
Create keyword exclusions	Use each enterable line to enter a separate keyword exclusion.
Display keyword exclusions	Select *Display* to advance to the *First Work with Keyword Exclusions Screen*

Working with Tax Product Code Cross References (WTPC)

Purpose: Use this menu option to create a cross reference between a tax product code and an item class, long SKU division, long SKU department, and long SKU class combination.

Avalara Tax Integration: The Avalara AvaTax integration uses the tax product code to determine the tax for a particular product class. If a tax code is not associated with an item, AvaTax assigns a default tax code of `U0000000`, indicating an unknown tax code. See the *Avalara AvaTax Interface* and *Avalara AvaTax Setup* for more information.

Determining a match: In order to be considered a match to a tax product code, the item class, long SKU division, long SKU department, and long SKU class combination values must exactly match the values defined for an item.

Example: The following tax product code cross references are defined.

Item Class	L/S Division	L/S Department	L/S Class	Tax Product Code
NA	NA	100	100	PG068810
NA	100	100	NA	PC040111
ACC	NA	NA	NA	PA028802
ACC	100	100	NA	NA
ACC	100	100	100	98922

The system assigns the tax product code to each item using the item class, long SKU division, long SKU department, and long SKU class combination to find an exact match to a tax product code cross reference.

Item	Item Class	L/S Division	L/S Dept	L/S Class	Results
A101	ACC	100	100	200	no match found
A202	ACC	NA	100	200	no match found
A303		100	100	100	no match found
A404	ACC	NA	NA	NA	match to tax product code PA028802
A505	NA	NA	100	100	match to tax product code PG068810

In this topic:

- *Work with Tax Product Code Cross Reference Screen*
- *Create Tax Product Code Cross Reference Screen*

Work with Tax Product Code Cross Reference Screen

Purpose: Use this screen to work with tax product code cross references.

How to display this screen: Enter *WTPC* in the Fast path field at the top of any menu or select Work with Tax Product Code Cross Reference from a menu.

Field	Description
Item Class	A code to identify a group of items, such as computer hardware or computer software. Item Class codes are used as a high-level method to sort and classify inventory. You assign an item class to an item in the Item table (MITM). Enter a valid item class code and select *OK* to display tax product code cross references that match your entry. Alphanumeric, 3 positions; optional.

Field	Description
L/S Division	A code that represents a long SKU division. L/S divisions are used in conjunction with long SKU departments and long SKU classes for reporting purposes and to create a hierarchy within a company or entity. Long SKU division codes are defined in and validated against the L/S Division table (WLDV). Enter a valid long SKU division code and select *OK* to display tax product code cross references that match your entry. Alphanumeric, 4 positions; optional.
L/S Department	A code that represents a long SKU department. L/S departments are used in conjunction with long SKU divisions and long SKU classes for reporting purposes and to create a hierarchy within a company or entity. Long SKU department codes are defined in and validated against the L/S Department table (WLSD). Enter a valid long SKU department code and select *OK* to display tax product code cross references that match your entry. Alphanumeric, 5 positions; optional.
L/S Class	A code that represents a long SKU class. L/S classes are used in conjunction with long SKU departments and long SKU divisions for reporting purposes and to create a hierarchy within a company or entity. Long SKU class codes are defined in and validated against the L/S Class table (WLSC). Enter a valid long SKU class code and select *OK* to display tax product code cross references that match your entry. Alphanumeric, 4 positions; optional.
Tax Product Code	A code used to determine the tax for a particular item. Enter a valid tax product code and select *OK* to display tax product code cross references that match your entry. Alphanumeric, 24 positions; optional.

Screen Option	Procedure
Create a tax product code cross reference	Select *Create* to advance to the *Create Tax Product Code Cross Reference Screen*.
Change a tax product code cross reference	In the Action column, select *Change* for a tax product code cross reference to advance to the Change Tax Product Code Cross Reference screen. At this screen, you can change the Tax Product Code. See *Create Tax Product Code Cross Reference Screen* for field descriptions.
Delete a tax product code cross reference	In the Action column, select *Delete* for a tax product code cross reference to delete it.

Create Tax Product Code Cross Reference Screen

Purpose: Use this screen to create a cross reference between a tax product code and an item class, long SKU division, long SKU department, and long SKU class combination.

How to display this screen: Select *Create* on the *Work with Tax Product Code Cross Reference Screen*.

Field	Description
Item Class	A code to identify a group of items, such as computer hardware or computer software. Item Class codes are used as a high-level method to sort and classify inventory. You assign an item class to an item in the Item table (MITM). Item class codes are defined in and validated against the Item Class table; see *Working with Item Classes (WICL)*. Alphanumeric, 3 positions. Create screen: optional. Change screen: display-only.
L/S Division	A code that represents a long SKU division. L/S divisions are used in conjunction with long SKU departments and long SKU classes for reporting purposes and to create a hierarchy within a company or entity. Long SKU division codes are defined in and validated against the L/S Division table; see *Creating and Maintaining Long SKU Divisions (WLDV)*. Alphanumeric, 4 positions. Create screen: optional. Change screen: display-only.
L/S Department	A code that represents a long SKU department. L/S departments are used in conjunction with long SKU divisions and long SKU classes for reporting purposes and to create a hierarchy within a company or entity. Long SKU department codes are defined in and validated against the L/S Department table; see *Working with Long SKU Departments (WLSD)*. Alphanumeric, 5 positions. Create screen: optional. Change screen: display-only.
L/S Class	A code that represents a long SKU class. L/S classes are used in conjunction with long SKU departments and long SKU divisions for reporting purposes and to create a hierarchy within a company or entity. Long SKU class codes are defined in and validated against the L/S Class table; see *Working with Long SKU Classes (WLSC)*. Alphanumeric, 4 positions. Create screen: optional. Change screen: display-only.
Tax Product Code	A code used to determine the tax for a particular item. If you use the AvaTax interface, this is a tax code defined in AvaTax. Alphanumeric, 24 positions; required.

Setting Up the Purchasing Tables

Purpose:

- Working with Buyers (WBUY) explains how to create, change, delete, and display buyer information.
- Working with Purchase Order Ship Via (WPSV) explains how to create, change, delete, and display ship via codes for purchase orders.
- Working with Vendors (WVEN) includes how to create, change, delete, and display vendor information.
- Working With PO Additional Charges (WPAC) explains how to create, change, delete, and display additional charges for purchase orders.
- Working with Unit of Measure Conversions (WUMC) explains how to create, change, delete, and display unit of measure conversions between your selling unit of measure and the vendor's unit of measure.
- Working with Vendor Items (WVNI) describes how to create, change, delete, and display vendor item information. Vendor items are a reference between the vendor's item information and the item information used by your company.
- *Working with Vendor Upload (LVUP)* explains how to upload vendor information into Order Administration.
- *Working with Vendor Upload (LVUP)* explains how to upload vendor information into Order Administration.

Working with Buyers (WBUY)

Buyers are eligible to create purchase orders and may be assigned to purchase specific items. A record must be established on the system for every buyer. The Buyer table is required in order to use the Purchase Order function.

In this topic:

- *Work with Buyers Screen*
- *Create Buyer Screen*

Work with Buyers Screen

Purpose: Use this screen to create, change, delete, or display buyer information. Buyers are eligible to create purchase orders and may be assigned to purchase specific items. A record must be established on the system for every buyer.

How to display this screen: Enter *WBUY* in the Fast Path field at the top of any menu or select Work with Buyers from a menu.

Field	Description
Buyer	A code to identify a buyer. This code could be the Buyer's initials or any other coding system to identify the buyers. Alphanumeric, 3 positions; optional.
Description	The buyer's name, which is used on selected reports where the Buyer is included. Alphanumeric, 30 positions; optional.

Screen Option	Procedure
Create a new buyer	Select *Create* to advance to the *Create Buyer Screen*.
Change buyer information	Select *Change* for a buyer to advance to the Change Buyer Screen. At this screen you can change any information except the buyer. See *Create Buyer Screen* for field descriptions.
Delete buyer information	Select *Delete* for a buyer to delete it.
Display buyer information	Select *Display* for a buyer to advance to the Display Buyer Screen. You cannot update any information on this screen. See *Create Buyer Screen* for field descriptions.

Create Buyer Screen

To create: At the *Work with Buyers Screen*, select *Create*.

Field	Description
Buyer	The code that identifies a buyer on the system. A buyer is someone who creates the purchase order for an item. A Buyer manages inventory purchases which could be both initial and rebuy purchases or just rebuys. This code could represent the Buyer's initials or any other coding system to identify the Buyer. Alphanumeric, 3 positions. Create screen: required. Change screen: display-only.
Description	The buyer's name, which is used on selected reports where the Buyer is included. Alphanumeric, 30 positions; required.

Working with Purchase Order Ship Via (WPSV)

Purpose: Use the Purchase Order Ship Via function to add or maintain purchase order ship via codes. The system uses purchase order ship via codes during Purchase Order Maintenance to designate your preferred shipping method for the inventory. The system prints ship via information on the purchase orders.

In this topic:

- *Drop Ship Purchase Order Setup for Purchase Order Ship Vias*
- *Work with Purchase Order Ship Via Screen*
- *Create Purchase Order Ship Via Screen*

Drop Ship Purchase Order Setup for Purchase Order Ship Vias

Overview: When you generate drop ship purchase orders, the system defaults the ship via code from the order, as set up through *Working with Ship Via Codes (WVIA)*, onto the header of the drop ship purchase order, even though the Ship via field on the purchase order header is validated against the Purchase Order Ship Via table rather than the regular (order) Ship Via table.

The description of the purchase order ship via prints on the standard purchase order. As a result, if you generate drop ship purchase orders and use the standard purchase order print programs, you will need to set up purchase order ship via codes that match the regular (order) ship vias, so that the ship via is identified correctly to your drop ship vendors.

Example: A customer places an order for drop ship item DS123, and the ship via on the order is `10`: UPS two-day. When you run *Selecting Vendors for Drop Ship Processing (MDSP)*, it generates a drop ship purchase order to the vendor for the item, and sets the purchase order ship via for the generated drop ship purchase order to `10`. When you print the drop ship purchase order using the standard purchase order print programs, the description of the purchase order ship via `10`, set up through *Working with Purchase Order Ship Via (WPSV)*, prints. In order to indicate the correct ship via to your vendor, the description of regular (order) ship via `10` and purchase order ship via `10` should be the same.

Specifying purchase order print programs: You use the *PO Print Program (C64)* and *PO Print Program for PO Print in PO Sequence (C76)* system control values to specify the regular and drop ship purchase order print program(s). Standard setting for both values are *PURCHORDG* (graphical format). See the *Purchase Order* for samples and field descriptions.

Assigning a purchase order ship via to a drop ship vendor item: If you assign a purchase order ship via to a vendor item that will be included on a drop ship purchase order, this purchase order ship via is assigned to the drop ship purchase order detail line; however, the ship via for the purchase order detail line is included on the printed drop ship purchase order only if your unique print program supports it. The ship via from the originating order prints on the standard drop ship purchase order, as described above. As a result, specifying a purchase order ship via for the vendor/item of a drop ship item is not recommended unless you use your own unique print program that indicates the purchase order ship via on the purchase order detail line. See *Working with Vendor Items (WVNI)* for more information on setting up vendor items.

Supplier Direct Fulfillment integration: The ship via defined for the vendor item of the first line on a drop ship purchase order defaults to the header of a purchase order sent to Order Orchestration's Supplier Direct Fulfillment module; otherwise, if no ship via is defined for the vendor item on the first purchase order line, the ship via from the sales order header is assigned. If you use this integration to fulfill drop ship orders, you need to complete carrier setup in Order Orchestration for these ship vias, including making sure that the ship via codes map to the codes set up for an integrated shipping system that vendors use to confirm shipments of drop ship purchase orders. See *Working with Vendor Items (WVNI)* and *Interface with Order Orchestration's Supplier Direct Fulfillment Module: Overview and Setup* for more information.

Work with Purchase Order Ship Via Screen

How to display this screen: Enter *WPSV* in the Fast path field at the top of any menu or select Work with PO Ship Via from a menu.

Field	Description
Code	A code that represents a shipper used for shipping merchandise to your company. Numeric, 2 positions; optional.
Description	The description of the purchase order ship via code. Alphanumeric, 30 positions; optional.

Field	Description
Lead days	The number of days it takes the shipper to deliver merchandise to your company. Informational only. Numeric, 3 positions; optional.

Screen Option	Procedure
Create a ship via code	Select *Create* to advance to the *Create Purchase Order Ship Via Screen*.
Change a ship via code	Select *Change* for a ship via code to advance to the Change Purchase Order Ship Via Screen.At this screen you can change any information except the ship via code. See *Create Purchase Order Ship Via Screen* for field descriptions.
Delete a ship via code	Select *Delete* for a ship via code to delete it.
Display a ship via code	Select *Display* for a ship via code to advance to the Display Purchase Order Ship Via Screen. You cannot update any information on this screen. See *Create Purchase Order Ship Via Screen* for field descriptions.

Create Purchase Order Ship Via Screen

Purpose: Use this screen to create a purchase order ship via code.

How to display this screen: Select *Create* at the *Work with Purchase Order Ship Via Screen*.

Field	Description
PO shipper	A code that represents a shipper used for shipping merchandise to your company. Purchase order shipper codes are entered on the *Ship via* field for a purchase order and can be entered in the *Ship via* field for the Vendor/Item. These codes do not necessarily have to be the same codes defined for shippers of your consumer orders. Purchase Order Maintenance and Vendor/Item Maintenance validates against this table. Numeric, 2 positions. Create screen: required. Change screen: display-only.
Description	The description of the purchase order ship via code. This text prints on the purchase order. Alphanumeric, 30 positions; required.
Lead days	The number of days it takes the shipper to deliver merchandise to your company. Informational only. Numeric, 3 positions; optional.

Working with Vendors (WVEN)

Vendors are companies who supply you with merchandise or services. A record must be established on the system for every vendor from whom you purchase merchandise.

In this topic:

Upload vendors: You can upload vendor information into Order Administration using the Load Vendor Upload menu option; see *Working with Vendor Upload (LVUP)*.

Work with Vendors Screen

How to display this screen: Enter *WVEN* in the Fast path field at the top of any menu or select the Work with Vendors option from the menu.

Field	Description
Vendor #	A code that identifies a supplier who sells you goods or services. Numeric, 7 positions; optional.
Name	The name of the vendor. Alphanumeric, 30 positions; optional.
State	A code representing a state or province where a vendor's business is located. State codes are defined in and validated against the State table, which is accessible through the Work with Countries menu option; see *Setting Up the Country Table (WCTY)*. Alphanumeric, 2 positions; optional.

Field	Description
Postal	The vendor's postal (zip) code. Alphanumeric, 10 positions; optional.
Telephone #	The vendor't telephone number. Alphanumeric, 14 positions; optional.
Ext	The vendor's telephone number extension. Alphanumeric, 4 positions; optional.

Screen Option	Procedure
Create a new vendor	Select *Create* to advance to the *First Create Vendor Screen*.
Change vendor information	Select *Change* for a vendor to advance to the *First Change Vendor Screen*.
Delete vendor information	Select *Delete* for a vendor to delete it. An error message displays if vendor items exist for the vendor: `WARNING - VENDOR ITEMS EXIST. Press ENTER or Click OK to confirm delete of Vendor & Vendor's Items.`
Display vendor information	Select *Display* for a vendor to advance to the *First Display Vendor Screen*.
Create a vendor discount	Select *Discounts* for a vendor to advance to the *Work with Vendor Discounts Screen*.
Display vendor history	Select *History* for a vendor to advance to the *Display Vendor History Screen*.
Work with vendor contacts	Select *Contacts* for a vendor to advance to the *Work with Vendor Contacts Screen*.
Work with vendor FOB addresses	Select *FOB* for a vendor to advance to the *Work with Vendor FOB Address Screen*.
Display vendor notes	Select *Notes* for a vendor to advance to the *Work with Vendor Notes Screen*.
Work with user defined fields	Select *User Field* for a vendor to advance to the *Work with User Fields Screen*.

First Create Vendor Screen

Purpose: Use this screen to begin to create a vendor. This is the first of two Create Vendor screens; when you complete this screen, you advance to the *Second Create Vendor Screen*.

How to display this screen: Select *Create* at the *Work with Vendors Screen*.

Field	Description
Vendor	A code that identifies a supplier. Numeric, 7 positions. Create screen: required. Change screen: display-only.

Field	Description
Name	The name of the vendor or the vendor's company. Alphanumeric, 30 positions; required.
Address	The vendor's address, as it should appear on purchase orders. Alphanumeric, 3 lines with 32 positions each line; required.
City/State/Postal/ Country	The city, state, postal zip code, and country associated with the vendor. If the Require state field for the country in the vendor address is selected, the system requires a state code for the vendor address: `State is required for this country.` **Note:** The system does not validate the vendor's address in the same way it validates a customer's address, as in order entry. For example, it does not validate that the state is associated with the SCF for the postal code. City: alphanumeric, 25 positions; required. State: alphanumeric, 2 positions; optional. Postal code: alphanumeric, 10 positions; optional. Country code: alphanumeric, 3 positions; required.
Contact name	The name of your primary contact at the vendor site. This name prints on purchase orders. You can create additional contacts for a vendor from the *Work with Vendor Contacts Screen*. Alphanumeric, 30 positions; optional.
Phone #/Ext (Telephone number and extension)	The vendor's telephone number and extension. You can define a telephone number format to map to the phone numbers operators enter into the system. Telephone number formats are defined by arranging numbers and special characters such as hyphens and parenthesis in the same order and position as the numbers in a phone number would display. When an operator enters a phone number, the system compares the number of numeric characters in the phone number with the telephone number formats you have defined. In order to match a format, the phone number must have the same number of numeric positions as a telephone number format. If the system cannot find a match, the phone number does not map to a telephone number format and is saved as it was entered by the operator. Phone #: alphanumeric, 14 positions; optional. Extension: alphanumeric, 4 positions; optional.
Fax#	The telephone number for the vendor's fax machine. Faxing purchase orders or drop ship picks to the vendor is not currently implemented. Alphanumeric, 14 positions; optional.

Field	Description
Email	The vendor's email address. See *Email Address Validation* for information on how the system verifies that your entry is formatted correctly. **Emailing Purchase Orders** If the *Email Purchase Order (K80)* system control value and the vendor's Email P/O flag are selected, the system sends the purchase order to the vendor as an email attachment. See the *Email Purchase Order (K80)* system control value for more information. Alphanumeric, 50 positions; optional.
Email P/O	Indicates whether to send the purchase order to the vendor's email address as an attachment. Valid values are: *Selected* = Email the purchase order to the vendor. The .PDF file is attached to a plain-text email that is sent to the vendor's Email address. **Note:** If this field is selected, then you need to specify a valid Email address for the vendor. *Unselected* = Generate a .PDF file for printing. Regardless of the setting of this flag, you cannot send purchase orders by email unless the *Email Purchase Order (K80)* system control value is selected. See that system control value and *Purchase Order Emails* for more information on sending purchase orders to the vendor by email.
Remit to	The name of the person or company you send payment to for vendor invoices. The remit-to address prints on checks for the vendor. **Note:** If any portion of a name or address appears in the Remit to fields, the system will bypass the vendor name and address and print the Remit to name and address on checks. If you enter any information in the Remit to fields, be sure that it is correct and complete. Alphanumeric, 30 positions; optional.
Address	The address where you mail checks for the vendor. Alphanumeric, 30 positions; optional.

Field	Description
City/State/Postal/ Country	The city, state, postal zip code, and country where you should mail payment to the vendor. If the Require state field for the country in the vendor address is selected, the system requires a state code for the vendor address: `State is required for this country.` Alphanumeric, 25 positions; optional.
Email	The remit to vendor's email address. Informational only. See *Email Address Validation* for information on how the system verifies that your entry is formatted correctly. Alphanumeric, 50 positions; optional.

Screen Option	Procedure
Complete creation of a vendor	Select *OK* to advance to the *Second Create Vendor Screen*.
Create the Vendor Extended record	Select *Create Vend Ext* to advance to the *Change Vendor Extended Screen*.

Second Create Vendor Screen

Purpose: Use this screen to complete entry of a vendor.

How to display this screen: Select *OK* at the *First Create Vendor Screen*.

Field	Description
Print PO	Indicates whether purchase order forms print or are emailed for this vendor. If so, you order products on the purchase order, print it, then mail it to the vendor. • *Selected* = Print or email purchase orders for this vendor. • *Unselected* = Do not print or email purchase orders for this vendor. **Note:** If the *Email P/O* flag is selected, then this flag also needs to be selected.

Field	Description
Drop ship output	Indicates whether to process drop ship orders by printing purchase orders, pick slips/invoices, or transmitting information through the Order Orchestration interface for internet-based drop ship processing. Drop ship merchandise is merchandise that you sell but do not stock. Only items flagged as Drop ship are eligible for drop ship processing. • *Drop ship pick* = Print drop ship pick slips/ invoices for this vendor. • *Drop ship purchase order* = Print drop ship purchase orders for this vendor. When you print a drop ship purchase order, the system also prints a drop ship pick slip/invoice. • *OROB drop shipping* = Send drop ship purchase orders to Order Orchestration's Supplier Direct Fulfillment module for internet-based processing. See *Selecting Vendors for Drop Ship Processing (MDSP)* for information on generating drop ship pick slips or purchase orders. **Drop Ship integrations** The *Order Orchestration Drop Ship Integration* provide access to internet-based, collaborative environments for retailers and vendors to share and process information related to drop ship orders. If you use either of these integrations, your system generates drop ship purchase orders and automatically distributes them to the integrated application. *OROB drop shipping* is a valid selection only if the *Use OROB Drop Shipping (H13)* system control value is *selected*. If this system control value is *unselected* when you try to select *OROB drop shipping*, a message indicates `Collaborative shipping vendor is not allowed`. If you select *OROB drop shipping*, the *Email Address for Drop Ship Vendor Window* opens unless you have entered a vendor email address on the *Create Vendor Contact Screen*. **Generating CWPickOut messages:** The system also creates pick download triggers (File code of *PCH*) in the IL Outbound Trigger table when you generate a drop ship invoice if the *Create Generic Pick Download Triggers (I31)* system control value is *selected*. The PICK_OUT process in *Working with Integration Layer Processes (IJCT)* generates the Pick Message from Order Administration (CWPickOut) for each of these trigger records.
NA	**Scheduling:** See *Process Drop Ship Orders* to process drop ship picks or purchase orders using the periodic function *DSHPROC*. Alphanumeric, required.

Field	Description
Cutover date	The date when you switched a vendor's *Drop ship output* to *OROB drop shipping*, indicating when the system sends all new drop ship purchase orders for the vendor to Order Orchestration's Drop Ship Manager module. No cutover date is indicated if you did not switch the vendor's *Drop ship output* setting to *OROB drop shipping*: for example, if you assigned the vendor to *OROB drop shipping* at initial creation. Included on the Change and Display screen only. Numeric, 6 positions (in user date format); display only.
D/S batch size (drop ship batch size)	The number of picks to include in a drop ship batch when you are *Processing Drop Ship Orders by Batch (MDSB)* for this vendor. The drop ship batch size determines the number of pick slips that print in one batch before the system creates a new batch. *Example:* Batch size = 2 # of picks to release = 5 In this situation, the system generates 3 batches: Batch 1 contains 2 pick slips Batch 2 contains 2 pick slips Batch 3 contains 1 pick slip Numeric, 7 positions; optional.
PO ship via	A code that represents the shipper used for shipping merchandise to your company from this vendor. Purchase order ship via codes are defined in and validated against the PO Ship Via table; see *Working with Purchase Order Ship Via (WPSV)*. Numeric, 2 positions; optional.
Terms	A code for the terms and conditions for payment to the vendor, such as 30 days after invoice date or at the end of the month. Numeric, 2 positions; optional.
Discount % (Primary discount percentage)	The primary discount percentage applied towards items purchased from this vendor. This discount is applied to the dollar value of merchandise and is taken during Purchase Order Maintenance. Any other discounts from the Vendor Discount table are applied after the primary discount has been calculated. See *Work with Vendor Discounts Screen*. Numeric, 5 positions with a 2 place decimal; optional.

Field	Description
Surcharge %	A standing surcharge added to purchases from this vendor. A surcharge is typically added to purchases from a broker. The percentage is based on the item price in Purchase Order Maintenance. Numeric, 5 positions with a 2 place decimal; optional.
Quality rating	The vendor's quality rating, as calculated by the quality assurance database. Not currently implemented. Numeric, 5 positions with a 2 place decimal; system-assigned.
A/P interface vendor	The vendor code on your third party Accounts Payable system. This code is used as a bridge between Order Administration and your own Accounts Payable system. Alphanumeric, 10 positions; optional.
Parent vendor	A code for a company that is made up of one or more subsidiary vendors. If your unique interface program supports it, you can define a vendor as a parent vendor if you wish to pay the main (parent) vendor for the merchandise you received from each subsidiary (child) vendor. • If the vendor code defined in this field matches the code you are creating, this vendor represents a parent vendor. • If the vendor code defined in this field does not match the code you are creating, this vendor represents a child vendor.
NA	*Example:* Vendors 101, 102, and 103 all report to vendor 10123. Instead of paying vendors 101, 102, and 103 separately for the merchandise you received, you can pay vendor 10123 for all of the merchandise you received from each of the subsidiary vendors. If the Require Entry of Parent Vendor system control value is *selected*, you must enter a valid vendor code in this field or an error message indicates: `Parent Vendor number is required`. **Note:** Used only if your unique interface program supports it. Numeric, 7 positions; optional.

Field	Description
Currency code	A code to identify a currency type. This code is used by the Purchase Order system to identify a vendor's currency and to perform currency conversion processing if the vendor's currency is different from yours. Currency codes are defined in and validated against the Currency Code table (fast path = *WCUR*). Defaults from the *Local Currency Code (A55)* system control value, but you can override it. The currency code you enter here defaults when you enter purchase orders, but you can override it. **Note:** The Supplier Direct Fulfillment integration does not support currency conversion. Alphanumeric, 3 positions; required.
Vendor price currency	Indicates whether the prices from this vendor are in the system's currency or the vendor's own currency and controls how and when currency conversion takes place.

NA

Vendor Price Currency§	Calculation at Purchase Order Entry§	Calculation at Purchase Order Receiving§
S (system) = the price from the Vendor/Item table is in your local currency. (*default*)§	Vendor price = Price from the Vendor/Item table * currency conversion rate§	none§
V (vendor) = the price in the Vendor/Item table is in the vendor's currency.§	Cost = Price from the Vendor/Item table / currency conversion rate§	none§
N (no conversion) = the price in the Vendor/Item table is in the current currency.§	none§	Price from PO Entry / current currency conversion rate§

Field	Description
NA	**Note:** If this field is set to *N* or *V*, you must define vendor items in the Vendor Item table for the system to calculate the cost at the time of receiving. If you override the currency rate during Purchase Order Receiving, the system uses the following calculation: `Price from Purchase Order/current currency conversion rate.` **Note:** The Supplier Direct Fulfillment integration does not support currency conversion. Alphanumeric, 1 position; required.
VAT number	A number used when calculating foreign currency. Alphanumeric, 20 positions; optional.
Type of vendor	Identifies whether the vendor is an actual vendor or a manufacturer. Valid values are: • *Manufacturer* • *Vendor*
User fields	Use these fields to enter additional vendor information. The system defaults the Vendor user field 3 to the Item user field 3 field in Work with Item/SKUs (see Performing Initial Item Entry (MITM)) when you create or change an item and the program name *INR1156* has been defined in the User function field for the *CHGITEM* and *ADDITMSKU* user exit points. . Alphanumeric, three 10-position fields; optional.

Screen Option	Procedure
Create the Vendor Extended record	Select *Create Vendor Ext* to advance to the Change Vendor Extended Screen.

Email Address for Drop Ship Vendor Window

Purpose: Use this window to enter an email address for a vendor when you use the interface with Order Orchestration's Drop Ship Manager to process drop ship orders for the vendor.

Order Orchestration automatically sends email notification to vendors when you create and send drop ship purchase orders or when you request cancellation of an order line or change an order's shipping address.

How to display this screen: Select *OROB Drop Shipping* in the Drop ship output field on the *Second Create Vendor Screen* If you have not entered an email address for the vendor in the *Create Vendor Contact Screen*, this pop-up window opens.

Field	Description
Email address	The vendor contact's email address. See *Email Address Validation* for information on how the system verifies that your entry is formatted correctly. Alphanumeric, 50 positions; optional.

First Change Vendor Screen

To change: Select *Change* for a vendor at the *Work with Vendors Screen* to advance to the first Change Vendor screen. At this screen you can change any information except the vendor code. Select *OK* to advance to the *Second Change Vendor Screen*.

See *First Create Vendor Screen* and *Second Create Vendor Screen* for field descriptions.

Second Change Vendor Screen

How to display this screen: Select *OK* at the *First Change Vendor Screen*.

See *Second Create Vendor Screen* for field descriptions.

Screen Option	Procedure
Display vendor history	Select *Display Vendor Hist* to advance to the *Display Vendor History Screen*.
Display vendor extended information	Select *Change Vendor Ext* to advance to the *Display Vendor Extended Screen*.
Work with vendor contacts	Select *Vendor Contacts* to advance to the *Work with Vendor Contacts Screen*.
Display vendor notes	Select *Notes/comments* to advance to the *Work with Vendor Notes Screen*.

First Display Vendor Screen

To display: Select *Display* for a vendor at the *Work with Vendors Screen* to advance to the first Display Vendor screen. You cannot update any information on this screen. Select *OK* to advance to the *Second Display Vendor Screen*.

See *First Create Vendor Screen* for field descriptions.

Second Display Vendor Screen

How to display this screen: Select *OK* at the *First Display Vendor Screen*.

See *Second Create Vendor Screen* for field descriptions.

Screen Option	Procedure
Display vendor history	Select *Display Vendor Hist* to advance to the *Display Vendor History Screen*.
Display vendor extended information	Select *Display Vendor Ext* to advance to the *Display Vendor Extended Screen*.
Work with vendor contacts	Select *Vendor Contacts* to advance to the *Work with Vendor Contacts Screen*.
Display vendor notes	Select *Notes/comments* to advance to the *Work with Vendor Notes Screen*.

Display Vendor History Screen

Purpose: Use this screen to review performance statistics for this vendor. The OTHR_ASYNC job updates this information.

> **Note:**
>
> Purchase orders that you unlock through the *Unlock Purchase Order (MUPO)* option are not submitted (or resubmitted) to the OTHR_ASYNC job. As a result, there is no mechanism to Vendor History based on activity that occurred during the creation or maintenance session that resulted in the lock.

How to display this screen: Select *History* for a vendor at the *Work with Vendors Screen* or select *Display Vendor Hist* at the *First Display Vendor Screen* or the *Second Display Vendor Screen*.

Field	Description
Vendor	A code for the supplier of a product or service you purchase. Numeric, 7 positions; display-only.
Number POs	The number of purchase orders to date, since adding the vendor to the system. This information is also broken out into open POs (not received or partially received), held POs, and canceled POs. The fields are updated appropriately if you purge purchase orders. Numeric, 7 positions; display-only.
Value POs	The value of the purchase orders to date. This information is also broken out into open POs (unreceived or partially received), held POs, and canceled POs. These fields are updated appropriately if you purge purchase orders. Numeric, 7 positions; display-only.
Year	The current fiscal year. Numeric, 2 positions (YY format); optional.
Period	The current period. A period is user-defined, but usually refers to an accounting month. Accounting periods are defined in and validated against the Accounting Periods table. Numeric, 2 positions; optional.

Field	Description
# POs	The number of purchase orders for the year and period. These fields are not updated when you purge purchase orders, and contain true historical (life-to-date) information. Numeric, 7 positions; display-only.
Value POs	The value of the purchase orders for the year and period. These fields are not updated when you purge purchase orders and contain true historical (life-to-date) information. Numeric, 7 positions; display-only.

Change Vendor Extended Screen

Purpose: Use this screen to:

- review the dollar value of outstanding (unreceived or partially received) purchase orders for the vendor
- review or define the discount calculation method used for discounts in the Vendor Discount table

How to display this screen: Select *Change Vendor Ext* at the *First Change Vendor Screen* or the *Second Change Vendor Screen*.

Field	Description
Vendor	A code that identifies the supplier from whom you purchase goods or services. Numeric, 7 positions; display-only.
Vendor description (Unlabeled field to the right of the Vendor field)	The name of the vendor. Alphanumeric, 30 positions; display-only.
On order	The total dollar value of purchase orders which are outstanding (unreceived or partially received) for this vendor. Numeric, 13 positions with a 2-place decimal; display-only.
Priority	The Cash Disbursement priority, in a range from 9 (highest priority) to 0 (lowest priority). Numeric, 1 position; optional.

Field	Description
Discount calculation method	A code that defines the calculation method used for the three discounts from the Vendor Discounts table. Valid values are: • *Combined* = This discount method combines the total dollar amount of all 3 discounts to determine the net cost. • *Tiered* = This discount method calculates the largest discount against the purchase order's gross cost, then the second largest discount is calculated against the net result of the first discount, and the third largest discount is calculated against the net result of the second discount. • Blank = No discount is applied. • If you leave this field blank, you will not be able to apply any discounts when working with a purchase order, regardless of your entries in the discount fields. • These discounts do not apply to drop ship purchase orders. See *Combined Discount Calculation* and *Tiered Discount Calculation* for examples of each discount calculation. Required if using vendor discounts.

Display Vendor Extended Screen

Purpose: Use this screen to review:

- the dollar value of outstanding (unreceived or partially received) purchase orders for the vendor
- the discount calculation method used for discounts in the Vendor Discount table
- the dollar amount of cash that should be paid against outstanding invoices for the vendor and the weeks on which these payments should be disbursed

How to display this screen: Select *Display Vendor Ext* at the *First Display Vendor Screen* or the *Second Display Vendor Screen*.

For more information: See *Change Vendor Extended Screen* for a screen sample and field descriptions. You cannot change any information on this screen.

Work with Vendor Discounts Screen

Purpose: Use this screen to create vendor discounts to apply against the gross cost of the purchase order in Purchase Order Maintenance (see *Purchase Order Line Discount Screen*),

> **Note:**
>
> These discounts do not apply to drop ship purchase orders.

How to display this screen: Select *Discounts* for a vendor on the *Work with Vendors Screen*.

The following message indicates that you have not defined a *Discount calculation method* in the Vendor Extended table:

Discount Calculation Method not defined for Vendor.

Field	Description
Vendor #	A user-defined code to identify the supplier of an item. Vendor codes are defined in and validated against the Vendor table. See Numeric, 7 positions; display-only.
Vendor description (Unlabeled field to the right of the Vendor field)	The name of the vendor. Alphanumeric, 30 positions; display-only.
Discount (Discount fields)	The names of the three discount fields. These fields are controlled by the *Discount 1 Field (D97)*, *Discount 2 Field (D98)*, and *Discount 3 Field (D99)* values in the System Control table. The discount fields are blank if values have not been defined. **Note:** The system calculates the primary discount on a purchase order before calculating any discounts from the Vendor Discount table. Alphanumeric, 11 positions; display-only.
Percent	The percentage the system applies against the unit cost of an item on the purchase order. If you enter a discount percentage, you cannot enter a unit discount for the same discount field. The system calculates discount percentages before subtracting any dollar discounts. **Note:** The system calculates percentage discounts based on the method from the *Discount calculation method* field in the Vendor Extended table. See *Combined Discount Calculation* and *Tiered Discount Calculation* for examples of each. Numeric, 11 positions with a 4-place decimal; optional.

Field	Description
Unit discount	The dollar amount the system subtracts from the unit cost of an item on the purchase order. If you enter a unit discount amount, you cannot enter a discount percentage for the same discount field. **Note:** The system calculates percentage discounts based on the method from the *Discount calculation method* field in the Vendor Extended table. See *Combined Discount Calculation* and *Tiered Discount Calculation* for examples of each. Numeric, 11 positions with a 4-place decimal; optional.

Instructions: Use the following steps to create a vendor discount:

1. Complete the Percent or Unit discount field for each discount field label. If you leave both the Percent and Unit discount fields blank, no discount will apply for this label.
2. Select *OK*. The system validates your entries and highlights any fields you need to correct. Correct any fields again.
3. The discounts you have entered will apply to all purchase orders entered for this vendor. These discounts are calculated based on the method you have entered in the *Discount calculation method* field in the Vendor Extended table.

See *Combined Discount Calculation* and *Tiered Discount Calculation*.

> **Note:**
>
> The calculation of discounts in a foreign currency is not currently implemented.

Combined Discount Calculation

The combined discount calculation method combines the values of all 3 discounts to determine the net cost. Any discount percentages defined for the discounts are calculated before the unit discounts are applied.

The Combined Discount Calculation does not apply to drop ship purchase orders.

Example: An example of the combined discount calculation method is:

Cost of item = $100.00

Primary discount (defined in Vendor table) = 10%

Discount 1 = $10.00 (unit discount)

Discount 2 = 20% (percentage discount)

Discount 3 = 10% (percentage discount)

Step 1: Calculate the primary discount percentage

cost ($100.00) x primary discount (10%) = unit discount amount for primary discount ($10.00)

Step 2: Subtract the primary discount amount from the cost

cost ($100.00) - primary discount ($10.00) = cost after primary discount ($90.00)

Step 3: Calculate discount 2 percentage

cost ($90.00) x discount 2 (20%) = unit discount amount for discount 2 ($18.00)

Step 4: Calculate discount 3 percentage

cost (90.00) x discount 3 (10%) = unit discount amount for discount 3 ($9.00)

Step 5: Add discount amounts 1, 2 and 3 together

discount 2 ($18.00) + discount 3 ($9.00) + discount 1 ($10.00) = combined discount ($37.00)

Step 6: Subtract the total combined discount amount from the cost

cost ($90.00)- total combined discount (37.00) = net cost ($53.00)

Tiered Discount Calculation

The tiered discount calculation method calculates:

- the largest discount against the item's cost, then
- the second largest discount is calculated against the net result of the first discount, then
- the third largest discount is calculated against the net result of the second discount

Any discount percentages defined for the discount fields are calculated before the unit discounts are applied.

> **Note:**
>
> The Tiered Discount Calculation does not apply to drop ship purchase orders.

Example: An example of the tiered discount calculation method is:

Cost of item = $100.00

Primary discount (defined in Vendor table) = 10%

Discount 1 = $10.00 (unit discount)

Discount 2 = 20% (percentage discount)

Discount 3 = 10% (percentage discount)

Step 1: Calculate the primary discount percentage

cost ($100.00) x primary discount (10%) = unit discount amount for primary discount ($10.00)

Step 2: Subtract the primary discount amount from the cost

cost ($100.00) - primary discount ($10.00) = cost after primary discount ($90.00)

Step 3: Calculate the largest discount percentage

cost ($90.00) x discount 2 (20%) = largest discount amount ($18.00)

Step 4: Subtract the largest discount amount from cost

gross cost ($90.00) - largest discount ($18.00) = net of first calculation ($72.00)

Step 5: Calculate the 2nd largest discount percentage

net of first calculation ($72.00) x discount 3 (10%) = second largest discount amount ($7.20)

Step 6: Subtract the 2nd largest discount amount from cost

net of first calculation ($72.00) - second largest discount amount ($7.20) = net of second calculation ($64.80)

Step 7: Subtract the 3rd largest discount amount from cost

net of second calculation ($64.80) - third largest discount amount ($10.00) = net of third calculation ($54.80)

Work with Vendor Contacts Screen

Purpose: Use this screen to create, change, delete or display contacts for a specific vendor.

How to display this screen: Select *Contacts* for a vendor on the *Work with Vendors Screen*, or select *WW vend cntct* on the *First Change Vendor Screen*, *First Display Vendor Screen*, *Second Change Vendor Screen*, or *Second Display Vendor Screen*.

Field	Description
Vendor	The vendor number and description associated with the vendor contacts. Vendor number: numeric, 7 positions; display-only. Vendor description: alphanumeric, 30 positions; display-only.
Seq # (Sort sequence number)	The sort sequence number assigned to this vendor contact. This number determines how the vendor contacts display on the screen and on the Vendor Contact Listing (*Print List* to print). If you do not define a sort sequence number, the system assigns a sequence number of *0* to the vendor contact. **Note:** If you are using *Order Orchestration Drop Ship Integration* to automatically process drop ship orders for this vendor, you must enter the sequence number *999* to insure that email notifications are automatically sent to the vendor when you create drop ship purchase orders for this vendor. See *Email Address for Drop Ship Vendor Window* for more information.

Field	Description
NA	You can select *Resequence* to resequence each vendor contact that displays on the screen in increments of 2. For example contact 1 = sequence # 0 contact 2 = sequence # 0 contact 3 = sequence # 5 contact 4 = sequence # 8 When you select *Resequence*, the system resequences the vendor contacts in the following order: contact 1 = sequence # 1 contact 2 = sequence # 3 contact 3 = sequence # 5 contact 4 = sequence # 7 Numeric, 3 positions; optional.
Contact name	The name of the vendor contact. Alphanumeric, 30 positions; optional.
Title	The contact's title within the organization. Alphanumeric, 30 positions; display-only.
Type	A user-defined field to identify the address type. Informational only. Alphanumeric, 1 position; optional.

Screen Option	Procedure
Create a vendor contact	Select *Create* to advance to the *Create Vendor Contact Screen*.
Change a vendor contact	Select *Change* for a vendor contact to advance to the Change Vendor Contact screen. You can change any information on this screen except the vendor. See *Create Vendor Contact Screen*.
Delete a vendor contact	Select *Delete* for a vendor contact to delete it.
Display a vendor contact	Select *Display* for a vendor contact to advance to the Display Vendor Contact screen. You cannot change any information on this screen. See *Create Vendor Contact Screen*.
Resequence the sequence number for each vendor contact	Select *Resequence*. The system assigns sequence numbers to each vendor contact in increments of 2.

Create Vendor Contact Screen

Purpose: Use this screen to create a vendor contact.

How to display this screen: Select *Create* on the *Work with Vendor Contacts Screen*.

Field	Description
Vendor	The vendor number and description associated with the vendor contact you are creating. Vendor number: numeric, 7 positions; display-only. Vendor description: alphanumeric, 30 positions; display-only.
Contact name	The name of the vendor contact. Alphanumeric, 30 positions; required.
Contact title	The contact's title within the company. Alphanumeric, 30 positions; optional.
Address	Address lines 1, 2 and 3 for the vendor contact. The vendor's address defaults. Alphanumeric, 32 positions; address line 1 required, address lines 2 and 3 optional.
City/State/Postal/ Country	The city, state, postal zip code and country associated with the vendor contact. The vendor's city, state, postal code and country defaults. If the Require state field for the country in the vendor contact address is selected, the system requires a state code for the vendor address: `State is required for this country`. **Note:** The system does not validate the contact's address in the same way it validates a customer's address, as in order entry. For example, it does not validate that the state is associated with the SCF for the postal code. City: alphanumeric, 25 positions; required. State: alphanumeric, 2 positions; optional. Postal code: numeric, 10 positions; optional. Country: alphanumeric, 3 positions; required.
Phone #/Ext (Telephone number and extension)	The vendor contact's telephone number and extension. You can define a telephone number format to map to the phone numbers operators enter into the system. See *Setting Up the Country Table (WCTY)* for information on telephone number formats. Phone #: alphanumeric, 14 positions; optional. Extension: alphanumeric, 4 positions; optional.
Fax #/Ext	The telephone number for the vendor's fax machine. Faxing purchase orders is not currently implemented. Fax number: alphanumeric, 14 positions; optional. Extension: alphanumeric, 4 positions; optional.
Email address	The vendor contact's email address. See *Email Address Validation* for information on how the system verifies that your entry is formatted correctly. Alphanumeric, 50 positions; optional.

Field	Description
Address type	A user-defined field to identify the address type. Informational only. Alphanumeric, 1 position; optional.
Sort sequence #	The sort sequence number assigned to this vendor contact. This number determines how the vendor contacts display on the screen and on the Vendor Contact Listing (*Print List* to print). If you do not define a sort sequence number, the system assigns a sequence number of *0* to the vendor contact. **Note:** If you are using Order Orchestration Drop Ship Integration to automatically process drop ship orders for this vendor, you must enter the sequence number *999* to insure that email notifications are automatically sent to the vendor when you create drop ship purchase orders for this vendor. See Email Address for Drop Ship Vendor Window for more information.
NA	You can select *Resequence* on the Work with Vendor Contacts Screen to resequence each vendor contact that displays on the screen in increments of 2. For example contact 1 = sequence # 0 contact 2 = sequence # 0 contact 3 = sequence # 5 contact 4 = sequence # 8 When you select *Resequence*, the system resequences the vendor contacts in the following order: contact 1 = sequence # 1 contact 2 = sequence # 3 contact 3 = sequence # 5 contact 4 = sequence # 7 Numeric, 3 positions; optional.

Work with Vendor FOB Address Screen

Purpose: Use this screen to create, change, delete or display multiple FOB addresses for a specific vendor.

FOB (freight on board) address is the location where title to merchandise being shipped passes from the seller to the buyer. If the FOB address is an Origin type, ownership of the merchandise passes from seller to buyer at the origin of the shipping route, and the buyer is responsible for transportation costs and risk of loss or damage from that point. If the FOB address is a Destination type, ownership of the merchandise passes from seller to buyer at the receiving point for the merchandise, and the seller is responsible for transportation costs and risk of loss or damage until the merchandise reaches its destination.

How to display this screen: Select *FOB* for a vendor on the *Work with Vendors Screen*.

Field	Description
Vendor	The vendor number and description associated with the vendor. Vendor number: numeric, 7 positions; display-only. Vendor description: alphanumeric, 30 positions; display-only.
Type	This code identifies the address as an Origin (*O*) or Destination (*D*) type. • *Origin* = An Origin type FOB address specifies the location from which merchandise is being shipped, and indicates that ownership of merchandise being shipped transfers to the buyer when it leaves the vendor's warehouse (at the point of its shipping origin). • *Destination* = A Destination type FOB address specifies the location to which merchandise is being shipped, and indicates that ownership of the merchandise transfers to the buyer when it arrives at its destination. Alphanumeric, display-only.
City	The city of the FOB address. Alphanumeric, 25 positions; display-only.
State	The state of the FOB address. The system validates that the state you enter is assigned to the SCF in the first three positions of the postal code. Alphanumeric, 2 postions; display-only.
Postal code	The zip code of the FOB address. Alphanumeric, 10 postions; display-only.
Freight Terms	The freight terms for this vendor and this FOB address. Alphanumeric, 10 postions; display-only.

Screen Option	Procedure
Create a vendor FOB address	Select *Create* to advance to the *Create Vendor FOB Address Screen*.
Change a vendor FOB address	Select *Change* for a Vendor FOB address to advance to the Change Vendor FOB Address screen. You can change any information on this screen except vendor number and vendor name. See *Create Vendor FOB Address Screen* for field descriptions.
Delete a vendor FOB address	Select *Delete* for a vendor FOB address to delete it.
Display a vendor FOB address	Select *Display* for a vendor FOB address to advance to the Display Vendor FOB Address screen. You cannot change any information on this screen. See *Create Vendor FOB Address Screen* for field descriptions.

Create Vendor FOB Address Screen

Purpose: Use this screen to create a vendor FOB address.

How to display this screen: Select *Create* on the *Work with Vendor FOB Address Screen*.

Field	Description
Vendor	The vendor number and description of the vendor for whom you are creating an FOB address. Vendor number: numeric, 7 positions; display-only. Vendor description: alphanumeric, 30 postions; display-only.
Postal code	The zip code of the Vendor FOB address. Alphanumeric, 10 postions; required.
City	The city of the vendor FOB address. Alphanumeric, 25 positions; required.
State	The state of the vendor FOB address. If the Require state field for the country in the vendor FOB address is selected, the system requires a state code for the vendor address: `State is required for this country`. Alphanumeric, 2 postions; required.
Country	The country of the vendor FOB address **Note:** If the system control value *Use Zip/City/State Defaulting? (B13)* is *selected*, the City, State and Country fields will automatically display the correct address information when you enter a zip code in the Postal Code field. Alphanumeric, 3 postions; required.
Freight terms	A brief description of the freight terms for this vendor FOB address. Alphanumeric, 10 positions; required.
FOB type	Identifies the FOB type for this address. Valid types are Destination (*D*) and Origin (*O*). • *Destination* = the FOB address is the location to which merchandise is being shipped; this indicates that title to the merchandise passes from the seller to the buyer when the merchandise reaches its destination. • *Origin* = the FOB address is the location from which merchandise is being shipped; this indicates that title to the merchandise passes from the seller to the buyer as soon as the merchandise leaves the seller's dock (its shipping origin). Alphanumeric, required.

Work with Vendor Notes Screen

Purpose: Messages that apply to the vendor from whom the merchandise was purchased can be added, changed or viewed during Purchase Order Receipts. The Vendor table is updated with any changes made to the vendor notes during Purchase Order Receipts.

Optionally, you can choose whether to print the vendor notes on the purchase order form and the receiver's worksheet.

Vendor notes can also be entered, changed, or viewed using *Maintaining Purchase Orders (MPOE)* and *Receiving Purchase Orders (PORC)*.

How to display this screen: At the *Work with Vendors Screen*, select *Notes* for a vendor; or select *Notes* from the:

- *First Create Vendor Screen*
- *First Change Vendor Screen*
- *Second Create Vendor Screen*
- *Second Change Vendor Screen*
- *Work with Purchase Order (Header) Screen*
- *PO Maintenance - Maintain Detail Screen*
- *First Display Purchase Order Detail Screen* (PO inquiry)

Field	Description
Message	The message text for this vendor. Previously entered messages display when you access the screen. Additional lines are available to enter new messages. *Scroll* or *Page Down* to view additional messages or to access additional lines. Alphanumeric, 60 positions each line; optional.
Print	Indicates whether this message text on the line will print on the purchase order. You can choose which lines you want to print. The valid values are: • *Unselected* = Do not print the line information • *Selected* = Print the line text on the purchase order

Adding a new vendor note:

1. Enter the information you want on the first available line in the message section.
2. Use *Tab* to move to or *click* on the Print field. Enter a print code, if applicable.
3. When you finish the note, select *OK*. The system accepts the entry and updates the Vendor table.

Changing a vendor note:

1. Select *Add/Change*. The existing messages can now be changed.
2. Enter the changes as needed. The system accepts the entry and updated the Vendor table.

Working With PO Additional Charges (WPAC)

Purpose: Use Purchase Order (PO) Additional Charges to change, delete, display or create additional charges for purchase orders. Type of additional charges that can be added to a purchase order detail line include freight, brokerage, commission, duty, import, surcharge, or "other" fees.

Vendor/item assignment: You can also define additional charges that apply automatically to the vendor/item price (See *Working with Vendor Items (WVNI)*).

In this topic:

- *Work with PO Additional Charges Screen*
- *Create PO Additional Charge Screen*

Work with PO Additional Charges Screen

How to display this screen: Enter *WPAC* in the Fast Path field at the top of any menu or select Work with Purchase Order Additional Charges from a menu.

Field	Description
Code	A code that represents a type of additional charge for a purchase order detail line. Alphanumeric, 2 positions; optional.
Description	The description of the additional charge. Alphanumeric, 30 positions; optional.

Screen Option	Procedure
Create additional charges	Select *Create* to advance to the *Create PO Additional Charge Screen*.
Change additional charges	Select *Change* for a code to advance to the Change PO Additional Charge screen. At this screen you can change any information except the code. See *Create PO Additional Charge Screen* for field descriptions.
Delete additional charges	Select *Delete* for a code to delete it. **Note:** When you delete additional charges, the system does not check to see whether you added this charge to an existing purchase order.
Display additional charges	Select *Display* for a code to advance to the Display PO Additional Charge Screen. You cannot change any information on this screen. See *Create PO Additional Charge Screen* for field descriptions.

Create PO Additional Charge Screen

Purpose: Use this screen to create an additional charge.

How to display this screen: Select *Create* on the *Work with PO Additional Charges Screen*.

Field	Description
Code	A code that represents a type of additional charge for a purchase order detail line, such as for brokerage, commission, duty, freight, import, or surcharge. Alphanumeric, 2 positions. Create screen: required. Change screen: display-only.
Description	The description of the additional charge. Alphanumeric, 30 positions; required.
Type	Identifies the type of charge being added to the purchase order. Valid system-supplied types: *B* - Brokerage *C* - Commission *D* - Duty *F* - Freight *I* - Import *O* - Other *P* - Prep *R* - Royalty *S* - Surcharge You can define estimated additional charges for a purchase order during PO maintenance. The actual charges are captured for a purchase order during PO Receipts. You can also assign additional charges to a vendor item. Alphanumeric, 1 position; required.

Working with Unit of Measure Conversions (WUMC)

Purpose: Use this option to add or maintain unit of measure conversions between your selling *Unit of measure* and the vendor's unit of measure.

This table is used in *Maintaining Purchase Orders (MPOE)* and *Purchase Order Receipts*.

Conversion requirements: In order for costs to be calculated and printed correctly on the *Purchase Order*, you need to set up conversions:

- from the vendor’s unit of measure to your unit of measure, and
- from your unit of measure to the vendor’s unit of measure

Example:

You sell an item in single units (“eaches”), but buy them from the vendor in dozens. Set up:

- Conversion from dozens to eaches:
  - factor for dozens = 1
  - factor for eaches = 12
- Conversion from eaches to dozens:
  - factor for eaches = 12
  - factor for dozens = 12

> **Note:**
>
> You must define units of measure before creating Unit of Measure Conversions. See *Working with Units of Measure (WUOM)*. In addition, your items should have units of measure in the Item table and in the Vendor/Item table; see *Working with Vendor Items (WVNI)*.

In this topic:

- *Work with Unit of Measure Conversions Screen*
- *Create Unit of Measure Conversion Screen*

Work with Unit of Measure Conversions Screen

How to display this screen: Enter *WUMC* in the Fast Path field at the top of any menu or select Work with Unit of Measure from a menu.

Field	Description
From (Unit of measure)	A code that represents the starting *Unit of measure* for conversion. Alphanumeric, 3 positions; optional.
Unit of measure	The description of the “from” unit of measure code. Alphanumeric, 30 positions; optional.
To (Unit of measure)	A code that represents the destination *Unit of measure* for conversion. Alphanumeric, 3 positions; optional.
Unit of measure	The description of the “to” unit of measure code. Alphanumeric, 30 positions; optional.

Screen Option	Procedure
Create unit of measure conversion	Select *Create* to advance to the *Create Unit of Measure Conversion Screen*.
Change unit of measure conversion	Select *Change* for a unit of measure conversion to advance to the Change Unit of Measure Conversion Screen. At the Change screen you can change any information except the from and to codes and the conversion rate. See *Create Unit of Measure Conversion Screen* for field descriptions.
Delete unit of measure conversion	Select *Delete* for a unit of measure conversion to delete it.

Screen Option	Procedure
Display unit of measure conversion	Select *Display* for a unit of measure conversion to advance to the Display Unit of Measure Conversion Screen. You cannot change any information on this screen. See *Create Unit of Measure Conversion Screen* for field descriptions.

Create Unit of Measure Conversion Screen

To create: At the *Work with Unit of Measure Conversions Screen*, select *Create* to display the Create Unit of Measure Conversion screen.

> **Note:**
>
> You must define units of measure before creating Unit of Measure Conversions. See *Working with Units of Measure (WUOM)*. In addition, your items should have units of measure in the Item table and in the Vendor/Item table; see *Working with Vendor Items (WVNI)*.

Field	Description
From unit of measure	The *Unit of measure* code to convert from (e.g., EA = each). Validated against the Unit of Measure table; see *Working with Units of Measure (WUOM)*. Alphanumeric, 3 positions. Create screen: required. Change screen: display-only.
From factor	The number by which you multiply the From unit of measure to calculate the total quantity of the To unit of measure. `(From factor) X (From unit of measure) = (To factor) X (To unit of measure).` In other words: *2 EACHES = 1 PAIR* *12 EACHES = 1 DOZEN* *1 PAIR = 2 EACHES* *1 DOZEN = 12 EACHES* Numeric, 7 positions with a 2-place decimal; required.
To unit of measure	The *Unit of measure* to convert to (e.g., C24 = case of 24). Validated against the Unit of Measure table. Alphanumeric, 3 positions. Create screen: required. Change screen: display-only.
To factor	The number of the To unit of measure that equals the total quantity of the From unit of measure. See *From factor*. Numeric, 7 positions with a 2-place decimal; required.

Field	Description
Round	Specifies whether the system should round to the nearest value or truncate (cut off additional numbers from the end of the value). *Selected* = The system round up or down to the nearest value. For example, if the conversion ends up with 1.6 units, the system rounds up to 2 units. *Unselected* = The system truncates. For example, if the conversion ends up with 1.6 units, the system truncates to 1 unit.
Conversion rate	The conversion rate for the unit of measure. The system calculates the conversion rate automatically, using the factors. The conversion rate is calculated by taking the To factor divided by the From factor. Otherwise, select *Enter Factor/Rate* to enter an actual conversion rate, instead of supplying the factor information. *Example:* If the From unit of measure was EA for each and the To unit of measure was C24 for case of 24, the From factor would be 24, the To factor would be 1, and the calculated conversion rate would be 1/24, or 0.0416667. Numeric, 12 positions with 7-place decimal; required, or system-calculated.

Working with Vendor Items (WVNI)

Purpose: You can use the Work with Vendor Items screen to create, change, delete or display vendor item information. Vendor items are a reference between the vendor's item information and the item information used by your company. This bridge between your inventory and the vendor's equivalent inventory allows you to define default information for pricing, ordering and shipping. This information defaults onto the purchase order for this item and vendor, unless you enter other information to override the default.

Additionally, this function allows you to:

- work with special quantity break or promotional pricing offers for a vendor item
- review cumulative history for this vendor item
- use the Vendor Item Notes function to review, delete or maintain notes about this item; you have the option of printing these notes on the purchase order and on reports
- update multiple SKUs of a vendor item with information such as vendor price and ship weight
- update an item's standard cost

In this topic:

- *Work with Vendor Item Screen*
- *Create Vendor Item Screen*
- *Work with Vendor Item Price Break Screen*
- *Display Vendor Item History Screen*
- *Work with Vendor Item Add'l Charges Screen*
- *Multiple Vendor Item Update Screen*

- *Multiple SKU Updates Screen (Reviewing SKUs for Update)*
- *Updating Standard Cost*

Work with Vendor Item Screen

Purpose: Use this screen to change, delete, display or create the reference between the vendor's item information and the item information used by your company.

How to display this screen: Enter *WVNI* in the Fast path field at the top of any menu or select Work with Vendor Item from a menu.

Field	Description
Vendor #	A code that identifies the supplier of an item. Numeric, 7 positions; optional.
Item	The vendor's item code. Alphanumeric, 20 positions; optional.
Description	The description of the vendor's item. Alphanumeric, 30 positions; optional.

Screen Option	Procedure
Create a vendor item	Select *Create* to advance to the *Create Vendor Item Screen*.
Change vendor item information	Select *Change* for a vendor item to advance to the Change Vendor Item Screen. At this screen you can change any information except the vendor item code. See *Create Vendor Item Screen* for field descriptions.
Delete vendor item information	Select *Delete* for a vendor item to delete it. **Note:** If there are dependent records associated with this vendor item, the system checks for the existence of: • vendor/item additional charges • vendor/item notes • vendor/item price breaks • vendor/item history There are no restrictions when deleting vendor item records; however, the dependent records listed above will also be deleted.

Screen Option	Procedure
Display vendor item information	Select *Display* for a vendor item to advance to the Display Vendor Item Screen. You cannot change any information on this screen. See *Create Vendor Item Screen* for field descriptions. **Note:** From this screen, you can update the item's standard cost or advance to the following screens: • *Work with Vendor Item Price Break Screen* (*Price Break*) • *Display Vendor Item History Screen* (*History*) • *Work with Vendor Item Add'l Charges Screen* (*Additional Charges*) • *Multiple Vendor Item Update Screen* (*Notes*)
Add or change vendor item price breaks	Select *Price Break* for an item to advance to the *Work with Vendor Item Price Break Screen*.
Display vendor item history	Select *History* for a vendor item to advance to the *Display Vendor Item History Screen*.
Add or change vendor item additional charges	Select *Charges* for a vendor item to advance to the *Work with Vendor Item Add'l Charges Screen*.
Update the item's standard cost	Select *Update Standard Cost* for a vendor item. See *Updating Standard Cost*.
Add or change vendor item notes	Select *Notes* for a vendor item to advance to the *Work with Vendor Item Notes Screen*.
Work with user defined fields	Select *User Field* for a vendor item to advance to the *Work with User Fields Screen*.
Update multiple SKUs	Select *Update multiple SKUs* to advance to the *Multiple Vendor Item Update Screen*.

Create Vendor Item Screen

Purpose: Use this screen to create a vendor item.

How to display this screen:

- Select *Create* on the *Work with Vendor Item Screen*.
- You advance to this screen automatically when you create a non-SKU'd item if the *Auto Advance to Vendor Item Create (E78)* system control value is *selected*; see *Creating Non-SKU'ed Items Screen Flow*.
- You advance to this screen automatically when you create a SKU'ed item if:
  - The *Auto Advance to Vendor Item Create (E78)* system control value is *selected*, and
  - The *Auto Advance to SKU Create (B34)* system control value is *selected*, and

– The *Auto Advance to SKU Generator (J06)* system control value is *unselected*. See *Creating SKU'ed Items Screen Flow*.

Field	Description
Vendor	A user-defined code that defines the supplier of an item. Validated against the Vendor table. See *Working with Vendors (WVEN)*. Numeric, 7 positions. Create screen: required. Change screen: display-only.
Vendor item	The number or code the vendor uses to identify the item. This information prints on purchase orders. Alphanumeric, 20 positions; required.
Description	The description of the item, as defined by the vendor. This information prints on purchase orders. Alphanumeric, 30 positions; required.
Item/Colr Size Othr	The item and SKU you use to identify the item. Items and SKUs are validated against the Item/SKU tables. If you advance to the Create Vendor Item screen through Work with Item/SKUs, the item/SKU you are creating displays. Item: alphanumeric, 12 position; required. SKU: alphanumeric, three 4-position fields; optional.
Price	Represents the vendor's list price for this item. When you enter a purchase order, this price defaults unless there is a price override or special pricing set up for the vendor item. See the *Work with Vendor Item Price Break Screen* for more information. **Note:** The *Display Cost in Inventory (A38)* secured feature controls whether the Change Vendor Item and Display Vendor Item screens display the price. Numeric, 13 positions with a 4-place decimal; optional.

Field	Description
Minimum qty (Minimum quantity)	The minimum unit quantity (in retailer's unit of measure) of merchandise you are required to order from the vendor. You cannot create a purchase order for fewer than this amount. A message similar to the following in purchase order maintenance indicates that you entered a quantity lower than the minimum: `Minimum order quantity is 6.` **Note:** The minimum quantity is not enforced when creating sales orders for drop ship items. Numeric, 3 positions; optional.
Lead days	The number of days it takes a vendor to deliver this item when it is ordered through a purchase order. The system adds this value to the current date to determine the due date on a drop ship purchase order detail line and to calculate the expected ship date for drop ship items (see *Assign Drop Ship Expected Ship Date (I59)* for more information). Numeric, 3 positions; optional.

Field	Description
Order multiple	The number of units (in retailer's unit of measure) by which your order quantity must be divisible when you order this item from this vendor. For example, your vendor might have an item that he sells only by whole cartons of twelve. In this situation, the system displays a message such as the following if the quantity you enter on a purchase order is not divisible by 12: `Vendor requires that Item is ordered in multiples of 12` **Note:** If your vendor's unit of measure differs from your unit of measure, you do not need to enter a multiple number in the Order multiple field as long as you have set up correct conversion ratios through the *Working with Unit of Measure Conversions (WUMC)* menu option. For example, if your vendor's unit of measure is pairs, and your unit of measure is single items, the system will automatically calculate the conversion and display a message such as the following if the quantity you enter on a purchase order does not convert to the vendor's unit of measure: `Order quantity 5 must be able to divide evenly by vendor UOM 2.` **Note:** The order multiple is not enforced for the creation of sales orders for drop ship items. Unit of measure conversion is not supported by the Order Orchestration Supplier Direct Fulfillment integration. Numeric, 5 positions; optional.
Cubic volume	The cubic volume of the item, as defined by the vendor, used for informational purposes only. The cubic volume can refer to any dimensions. The system calculates the cube of each line when you enter a purchase order and arrives at a total cube for the order. Numeric, 5 positions; optional.

Field	Description
Ship weight	The shipping weight of the item, as defined by the vendor. Prints with the item on the purchase order and is used for informational purposes only. No calculations are performed for this value. Not included on a drop ship purchase order sent to Order Orchestration's Supplier Direct Fulfillment module. Numeric, 7 positions with a 3-place decimal; optional.
Ship via	A code that represents the carrier used when shipping this item to your company. If you enter a PO ship via code here, this code defaults on the vendor item purchase order line automatically. Validated against the PO Ship Via table; see *Working with Purchase Order Ship Via (WPSV)* for more information. See *Drop Ship Purchase Order Setup for Purchase Order Ship Vias* for considerations related to specifying a vendor item ship via for items that you will include on drop ship purchase orders. Numeric, 2 positions; optional.
Unit of measure	The vendor's *Unit of measure* for an item (e.g., C12 = case of 12, GRS = gross). The system validates this unit of measure against the Unit of Measure table. In PO Maintenance and Receiving, the system will convert your unit of measure into the vendor's unit of measure using the information provided in the Unit of Measure table. *Example:* If you sell an item in eaches, but the vendor sells the item to you in cases of 12 and you place an order for 36 units, the system will convert the vendor's quantity to 3 units. You enter the retailer's quantity on the PO; however, both quantities can be seen in PO Inquiry, Maintenance, and Receiving. A message similar to the following indicates that you entered an order amount that is not divisible by the unit of measure: `Order qty 7 must be able to divide evenly by vendor UOM 12.` **Note:** For a drop ship item, the vendor item unit of measure must match the item's unit of measure if you use the *Order Orchestration Drop Ship Integration* to process drop ship orders for this vendor. Alphanumeric, 3 positions; optional.
Message	An informational message that you can use for reporting purposes. Up to 3 lines of messages are available for free-form text, such as special packing instructions. Not included on a drop ship purchase order sent to Order Orchestration's Supplier Direct Fulfillment module. Alphanumeric, 30 positions (each line); optional.

Completing this screen:

- If you are creating a vendor item in *Working with Vendor Items (WVNI)*, the system clears the data from the screen.
- If you are creating a vendor item for a non-SKUed item in Work with Item/SKUs, you advance to the Create Item Offer screen, where you can enter offer information for the item you are creating.
- If you are creating a vendor item for a SKUed item in Work with Item/SKUs, you advance to the Create SKU (With Overrides) screen, where you can create another SKU for the item you are creating.

For more information: See *Performing Initial Item Entry (MITM)*.

Work with Vendor Item Price Break Screen

Purpose: You can use this screen to display, add or change price break information. Price breaks might be a special price promotion or a series of quantity break prices for this item and this vendor.

> **Note:**
>
> The *Display Cost in Inventory (A38)* secured feature controls the display of this screen.

Quantity Break Pricing Tables

Quantity break pricing tables allow you to define:

- a start and end date,
- the purchase quantity of the item required, and
- the special price at which the item may be purchased when the quantity requirements are met.

A quantity break pricing table is defined in tiers. For example:

Tier	Purchase Quantity Required	Special Price
1	1 - 9	$10.00
2	10 - 20	$9.50
3	21 - 30	$9.00

You receive the quantity price break for the next tier only if you order an amount greater than or equal to the quantity required.

How to display this screen: Select *Price Break* for a vendor item at the *Work with Vendor Item Screen*.

Field	Description
Start Date	The date when the special price promotion or quantity break price begins. Numeric, 6 positions (in user date format); optional.

Field	Description
Stop Date	The date when the special price promotion or quantity break price ends. Numeric, 6 positions (in user date format); optional.
Quantity	The quantity, in your own unit of measure, not the vendor's, that you must purchase to receive the special promotional price or quantity break price on this item from the vendor. *Example*: `Qty=1 Price=$10.00` `Qty=10 Price=$9.50` If you purchase between 1-9, the price is $10.00. Numeric, 7 positions; optional.
Price	The vendor's special price, per vendor's unit of measure, for this item if you order the quantity required (in retailer's unit of measure). *Example:* If the vendor sells the item in pairs, but you sell the item as single units (eaches): Vendor's base price is $12.00/pair Quantity: you enter a quantity on this screen of 12. Price: you enter a price for the quantity 12 of $10.00 When you enter a purchase order, you order 12 of the item. *Result:* The system converts the quantity 12 (single units) to vendor's quantity of 6 (pairs), but prices the item at $10.00/pair, or total of $60.00, because you ordered, in retailer's unit of measure, enough units to qualify for the discount price. Numeric, 13 positions with a 4-place decimal; optional.

Using this screen: To add or change a price break, select *Add/Change*. The screen changes to *CHANGE* mode, which means the fields are enterable, so you can enter or change information.

- If the screen is in *ADD* mode, any prices that are already displayed are locked and the cursor is positioned at the next available line.
- If the screen is in *CHANGE* mode, the cursor is positioned at the top of the screen and all fields are available for entry.

Display Vendor Item History Screen

Purpose: Use this screen to review performance statistics for this item, as supplied by this vendor. All information on this screen is updated by the system, either through *Maintaining Purchase Orders (MPOE)* or *Purchase Order Receipts*. This information represents an aggregate history of this item across all purchase orders for this vendor.

How to display this screen: Select *History* for a vendor item at the *Work with Vendor Item Screen*.

Field	Description
Vendor	A numeric code that defines the supplier of an item. See *Working with Vendors (WVEN)*. Numeric, 7 positions; display-only

Field	Description
Vendor item	The number or code the vendor uses to identify the item. Alphanumeric, 20 positions; display-only.
Last purchase price	The price at which this item was last purchased from this vendor, expressed per retailer's unit of measure. For example, if the vendor sells the item in pairs, priced at $12.00/ pair, but you sell the item as single units (eaches), the price displayed here would be $6.00. See *Working with Unit of Measure Conversions (WUMC)*. **Note:** The *Display Cost in Inventory (A38)* secured feature controls the display of the Last purchase price field. Numeric, 13 positions with a 4-place decimal; display-only.
Orders	The number of purchase orders placed with the vendor for this item. This number includes every PO that has been placed, including cancelled POs. The system updates this field only once, regardless of the number of times the item is entered on a PO. Numeric, 7 positions; display-only.
Shipments	The total number of shipments of this item. Updated by PO Receiving and the number increases each time the item is received. For example, if 100 items were ordered, and 25 were received one day and 75 were received the next day, the number of shipments is 2. Numeric, 7 positions; display-only.
Overships	The number of times the vendor has shipped more of this item than was requested on purchase orders. Updated by PO Receiving and is determined when the PO is closed. Numeric, 7 positions; display-only.
Underships	The number of times the vendor has shipped fewer of this item than was requested on purchase orders. Updated by PO Receiving and is determined based on the PO line being closed and order entry does not match. Numeric, 7 positions; display-only.
Late shipments	The number of times the vendor has shipped this item late. If the receiving date is greater than the original PO due date, the system considers this a late shipment. Updated by PO Receiving. Numeric, 5 positions; display-only.
Defects	The number of items that have been identified as defective at PO Receiving. Numeric, 7 positions; display-only.
Units received	The quantity of this item received by this vendor life-to-date, in retailer's unit of measure. Updated by PO Receiving. Numeric, 7 positions; display-only.

Field	Description
Units purchased	The quantity of this item purchased from this vendor, in retailer's unit of measure. This number includes cancellations (i.e., cancellation does not decrease this number). Numeric, 7 positions; display-only.
Value purchases	The merchandise dollar value of purchases of this item from this vendor. Updated by PO Maintenance and includes cancellations. **Note:** The *Display Cost in Inventory (A38)* secured feature controls the display of the Value purchases field. Numeric, 20 positions with a 2-place decimal; display-only.
Elapsed days	An accumulation of the number of days it takes the vendor to ship this item to you. The system calculates as follows: each time the item is received, the system subtracts the PO date from the Receipt date and adds it to the field. The average elapsed days can be calculated by dividing elapsed days by the number of shipments. Numeric, 7 positions; display-only.
Late days	The accumulated number of days this item is received late from the vendor. The system calculates by subtracting the PO Receipt date from the original due date. Numeric, 7 positions; display-only.

Work with Vendor Item Add'l Charges Screen

Purpose: Use this screen to display, add or change additional charge information.

If the *Default Vendor Item Additional Charges (I21)* system control value is *selected*, the system defaults the vendor item additional charges to the purchase order. You can review the defaulted vendor item additional charges on the purchase order at the *Work with PO Detail Estimated Charges Screen*.

Receipt cost calculation: The system calculates all vendor item additional charges into the costing calculations for a purchase order if the *Default Vendor Item Additional Charges (I21)* system control value is *selected* and the *Include PO Estimated Charges in Receipt Cost Calculation (G29)* system control value is *selected*.

See *Distributing Overhead Costs* for more information on the calculations the system performs when distributing overhead costs across purchase orders.

How to display this screen: On the *Work with Vendor Item Screen*, select *Charges* for a vendor item.

Field	Description
Charge	A user-defined code that identifies a purchase order detail line for brokerage, commission, duty, freight, import, surcharge, or other user-defined fees. Additional charges are validated against the PO Additional Charge table; see *Working With PO Additional Charges (WPAC)*. Alphanumeric, 2 positions; required.
Description	A description of the additional charge. Alphanumeric, 30 positions; required.
Unit amount	The dollar amount to add to the purchase order for each unit (in retailer's unit of measure) of the vendor item. Numeric, 12 positions; required if you do not specify a percent.
Percent	The percent of the total merchandise amount to add to the purchase order for total orders of the vendor item. Numeric, 6 positions; required if you do not specify a unit amount.

Screen Option	Procedure
Add or change an additional charge	Select *Add/Change* to toggle between add and change mode. Change mode is available only if you have already created additional charges for the vendor item. When in change mode, the existing additional charge code and unit amount or percent becomes enterable.

Multiple Vendor Item Update Screen

Purpose: Use this screen to update selected fields for all the SKUs of a specific vendor item. You can also choose to update only those SKUs that share the first SKU element.

How to display this screen: Select *Update Multiple SKUs* on the *Work with Vendor Item Screen*.

Field	Description
Vendor	A numeric code that defines the supplier of an item. Numeric, 7 positions; display-only.
Item/SKU	Your item number or code (*not* the vendor item code). To update all vendor item SKUs: enter the base item code *only*. To update all SKUs with the same first SKU element: enter the first SKU only to update only matching SKUs for the vendor item; for example, enter *BLUE* to update all blue SKUs of the vendor item Item: Alphanumeric, 12 positions; required. SKU: Alphanumeric, three 4-position fields; optional.
Price	The vendor's list price for this item. This price defaults on the purchase order Numeric, 13 positions with a 4-place decimal; optional.

Field	Description
Minimum qty (Minimum quantity)	The minimum unit quantity of the vendor item that you can order. Numeric, 3 positions; optional.
Lead days	The number of days it takes a vendor to deliver this item to you. Numeric, 3 positions; optional.
Order multiple	The number by which the purchase order quantity must be divisible. Numeric, 5 positions; optional.
Cubic volume	The cubic volume of the item, as defined by the vendor, used for informational purposes only. Numeric, 5 positions; optional.
Ship weight	The shipping weight of the item, as defined by the vendor. Numeric, 7 positions with a 3-place decimal; optional.
Ship via	A code that represents the carrier used when shipping this item to your company. Numeric, 2 positions; optional.
Unit of measure	The vendor's unit of measure for an item (e.g., C12 - case of 12, GRS - gross). The system validates this unit of measure against the Unit of Measure table. Alphanumeric, 3 positions; optional.
Message	An informational message that can be used for reporting purposes. Up to 3 lines of messages are available for free-form text, such as special packing instructions. Alphanumeric, 30 positions (each line); optional.

Instructions: To update the SKUs for a specific vendor item:

1. Complete the vendor number, the item code, and (optionally) the SKU.
2. Complete any of the remaining fields to indicate which information you want to update. Only the fields you enter will be updated for the target vendor item SKUs; any fields you leave blank on the Multiple Vendor Item Update field will remain unchanged.
3. The Confirm Multi Vendor Item Update pop-up window opens.
4. Select *OK* to update the SKUs for the vendor item or select *Exit* to cancel. You can also select *Review Select SKUs* to review the SKUs that are being updated. See *Multiple SKU Updates Screen (Reviewing SKUs for Update)*.
5. If you select *OK*, the following message informs you the SKU updates have completed: Vendor Item updates have been completed.

Screen Option	Procedure
Review the SKUs being updated	Select *Review Select SKUs* to advance to the *Multiple SKU Updates Screen (Reviewing SKUs for Update)*.

Multiple SKU Updates Screen (Reviewing SKUs for Update)

Purpose: Use this screen to review the SKUs for the vendor item you wish to update.

How to display this screen: Select *Review Select SKUs* on the *Multiple Vendor Item Update Screen*.

Field	Description
Vendor	The code and name of the vendor who supplies the item you wish to update. Vendor code: numeric, 7 positions; display-only. Vendor name: alphanumeric, 30 positions; display-only.
Item	The item number and description of the item you wish to update. Item number: alphanumeric, 12 positions; display-only. Description: alphanumeric, 120 positions; display-only.
Colr, size othr	The SKU you use to identify the item you wish to update. SKUs are validated against the Item/SKU table. Alphanumeric, three 4-position fields; display-only.
Vendor item	The vendor item number of the item you wish to update. Alphanumeric, 20 positions; display-only.

Updating Standard Cost

Purpose: You can update an item's or SKU's standard cost through the *Work with Vendor Item Screen*, Change Vendor Item screen, or Display Vendor Item screen. There is also a periodic function available to update standard cost.

How to update: You can update the standard cost for a selected item by:

- selecting *Update Standard Cost* for a vendor item at the *Work with Vendor Item Screen*
- selecting *Update Standard Cost* at the Change Vendor Item screen or Display Vendor Item screen

> **Note:**
>
> Access to updating standard cost is controlled by the *Display Cost in Inventory (A38)* secured feature. If you do not have authority under that secured feature, the system displays an error message when you select *Update Standard Cost* at the *Work with Vendor Item Screen*: `Not authorized to change Standard Cost.`

If the vendor is not the item's primary vendor: The vendor item you select must be associated with the item's primary vendor (the primary vendor is the vendor you enter at the first Create or Change Item screen in Work with Items; see *Performing Initial Item Entry (MITM)*). If you attempt to update item cost but the vendor item is not associated with the item's primary vendor, a message such as the following indicates:

Can't update standard cost. Vendor# 12 is not item's primary vendor

Pop-up window: The Confirm Update of Item’s Standard Cost window opens when you choose to update the standard cost for an eligible vendor item.

Processing the update: After you select *OK* at the confirmation window, a message such as the following indicates:

SKU standard cost has been updated (WA123 10.6000)

The message includes your item code for the item you have just updated, and the new standard cost.

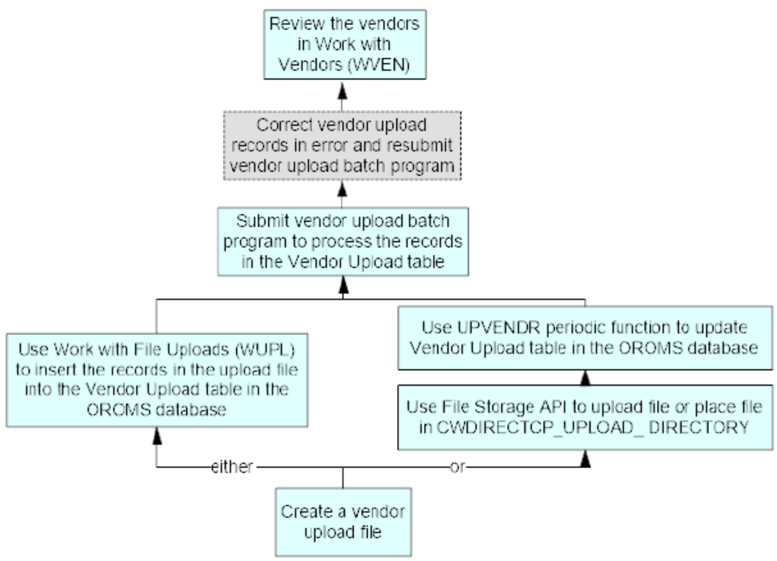
Working with Vendor Upload (LVUP)

Purpose: You use information in the Vendor Upload table to create, update, or delete a vendor record in Order Administration.

When you transfer vendor information into Order Administration, the system validates each record in the table:

- if a vendor upload record contains any errors, Order Administration prints the record on the *Vendor Upload Error Report* and places the record in an error status. You need to correct the error and resend the record through the vendor upload batch program.
- if a vendor upload record does not contain errors, Order Administration creates or updates the vendor record. See *Working with Vendors (WVEN)* for more information on vendors in Order Administration.

Vendor upload process:



> **Note:**
>
> You can also schedule this process to run periodically by setting up the VNUPLD function using the PRF0086 program. See *Scheduling Jobs* for background.

In this topic:

- *Create Vendor Upload File*
- *Transfer the Vendor Upload File to Order Administration*
- *Submit Vendor Upload Screen*
- *Vendor Upload Process*

- *Vendor Upload Errors*
- *Vendor Upload Table (VNDUPL)*
- *Vendor Upload Error Report*

Create Vendor Upload File

You can create a Vendor Upload file by:

- creating your own pipe delimited file, using a text editor or spreadsheet application, or
- copying the sample file upload data, pasting the data into a text editor, and saving it with the file extension `.txt`.
- If you wish to leave any field in the upload file blank, pass a space in an alphanumeric field and a 0 in a numeric field so that the file can be processed without errors. Leaving a field with no space or 0 is interpreted as null in the database and causes errors.

The file name should be VNDUPL.TXT.

Sample vendor upload data:

```
007|7|A|EXAMPLE VENDOR |1234 SAMPLE STREET |SECOND ADDRESS LINE |THIRD
ADDRESS LINE |FOURTH ADDRESS LINE |WESTBOROUGH |MA|01581 |US |JOHN SMITH |
5085550100| |0|ROBERT JONES |1234 REMIT SAMPLE ST |SECOND ADDRESS LINE |
THIRD ADDRESS LINE |FOURTH ADDRESS LINE |SPRINGFIELD |MA|01119 |US |Y|N|Y|
P|0|0|N|N|N|N|N |0|.00|.00|.00| |0| |S| |V| |VENDOR@EXAMPLE.COM |
REMIT@EXAMPLE.COM |USR1 |USR2 |USR3 | |Y
```

Transfer the Vendor Upload File to Order Administration

Use the *File Storage API*and run the *UPVENDR Upload Vendor File* (Program name *PFR0134*, Parameter *VNDUPL*) periodic function, or

Use the *Work with File Uploads (WUPL)* menu option to select and process the Vendor Upload file. The system inserts the records in the Vendor Upload file into the Order Administration Vendor Upload table. See *File Upload Process* for processing information.

Submit Vendor Upload Screen

Purpose: Use this screen to submit a batch program to transfer the records in the Vendor Upload table to the Order Administration Vendor table.

How to display this screen: Enter *LVUP* in the Fast path field at the top of a menu or select Load Vendor Upload from a menu.

Screen Option	Procedure
Submit a batch program to upload the vendor upload records to the Vendor table	Select *Submit*. See *Vendor Upload Process*. *Periodic function:* You can also schedule this process to run periodically by setting up the VNUPLD function using the PRF0086 program. See *Scheduling Jobs* for background.

Vendor Upload Process

To process: Select *Submit* at the *Submit Vendor Upload Screen* to submit the vendor upload batch program.

If you try to submit the vendor upload batch program while a vendor upload is in progress, a message indicates: `VENDOR UPLOAD in progress.`

The Vendor Upload batch program:

- determines if an active procedure indicates that a vendor upload batch program is already running for the company.
  - If an active procedure exists, an error message indicates: `Vendor Upload in progress`. You cannot submit another vendor upload batch job until the job currently running is complete.
  - If no active procedure exists, the system creates an active procedure for this vendor upload batch job.
- validates each vendor upload record in the *Vendor Upload Table (VNDUPL)*
  - if the vendor upload record contains an error, the system updates the *Vendor upload error* field with the error message and does not transfer the record to the Vendor table. You can review vendor upload records in error on the *Vendor Upload Error Report*
  - if the vendor upload record is a *D* (delete) record type, the system updates the *Vendor upload error* field with the error message `Delete` and does not delete the Vendor record. You must manually delete the vendor.
  - if the vendor upload record is an *A* (add) record type and passes validation, the system creates a record in the Vendor table and Vendor Extended table and deletes the corresponding vendor upload record from the Vendor Upload table.
  - if the vendor upload record is an *M* (modify) record type and passes validation, the system updates the existing record in the Vendor table and Vendor Extended table and deletes the corresponding vendor upload record from the Vendor Upload table. **Note:** The system updates the existing vendor record with the information in the vendor upload record, including blanks. For example, if the vendor record has a value in the remit to name and address fields but the vendor upload record does not have these fields populated, the system updates the remit to name and address fields for the vendor to blank.

  .
- produces the *Vendor Upload Error Report*, which lists each vendor upload record that contains an error. **Note:** Each vendor upload record in an error status is associated with only one error (the first error the system finds for the record). Once you correct the error and resubmit the vendor upload batch program, the system validates the record for additional errors.
  - deletes the active procedure for the vendor upload batch program.

Vendor upload validation: The vendor upload batch program validates that:

- if the upload record is a modify or delete record, the Vendor number must be a valid vendor in Order Administration.
- all required fields contain information. The fields in the Vendor Upload table that are required are:
- *Company*
- *Vendor #*
- *Record type*
- *Vendor name*

- *Vendor address line 1*
- *Vendor city*
- *Vendor state*
- *Vendor zip*
- *Vendor country*
- *Print PO?*
- *Fax?*
- *Print checks?*
- *Drop ship pick*
- *Factor?*
- *EDI?*
- *Price currency type*
- *Type*
- all fields that require a valid value contain a valid value. The fields in the Vendor Upload table that require a valid value are:
- *Company*
- *Record type*
- *Vendor state*
- *Vendor country*
- *Remit to country*
- *Remit state*
- *Print PO?*
- *Fax?*
- *Print checks?*
- *Drop ship pick*
- *Ship via code*
- *Factor?*
- *EDI?*
- *Terms code*
- *Parent vendor number*
- *Currency code*
- *Price currency type*
- *Type*
- if the vendor upload record is an add record (record type *A*), the vendor number does not already exist in the company where you are uploading. You can correct this error by changing the record type to *M* to represent a modify.
- if the vendor upload record is a modify record (record type *M*) or delete record (record type *D*), the vendor number must exist in the company where you are

uploading. You can correct this error by changing the record type to *A* to represent an add.

Vendor Upload Errors

If a vendor upload record is in error, the vendor upload batch program assigns an error status and prints the record on the *Vendor Upload Error Report*.

A field that is required is blank:

- *Company* field is blank: `Missing Company`
- *Record type* field is blank: `Missing Record Type`
- *Vendor #* field is blank: `Missing vendor number`
- *Vendor name* field is blank: `Missing vendor name`
- *Vendor address line 1* field is blank: `Missing address line 1`
- *Vendor city* field is blank: `Missing City`
- *Vendor state* field is blank: `Missing State`
- *Vendor zip* field is blank: `Missing Postal Code`
- *Vendor country* field is blank: `Missing Country`
- *Print PO?* field is blank: `Missing Print PO`
- *Fax?* field is blank: `Missing Fax PO`
- *Print checks?* field is blank: `Missing Print Checks Response`
- *Drop ship pick* field is blank: `Missing Drop Ship Output Response`
- *Factor?* field is blank: `Missing Vendor Factor`
- *EDI?* field is blank: `Missing EDI P/O Response`
- *Parent vendor number* field is blank
- *Price currency type* field is blank: `Missing Vendor Price Currency Response`
- *Type* field is blank: `Type of Vendor Invalid`
- The *Fax?* field is Y and the *Vendor fax #* field is blank: `Fax Number Missing and Fax Flag is Y`

> **Note:**
>
> Faxing is not currently implemented.

- *Vendor e-mail address* field is blank and the *Email PO* field is set to Y: `Vendor e-mail is required`

A field contains an invalid value:

- *Company* field contains a company code that does not exist: `Invalid Company`
- *Record type* field contains an invalid value: `Record Type Invalid`
- *Vendor state* field contains an invalid value: `State Does Not Exist`

- *Vendor country* field contains an invalid value: `Country Does Not Exist`
- *Remit to country* field contains an invalid value: `Remit To Country Does Not Exist`
- *Remit state* field contains an invalid value: `Remit To State Does Not Exist`
- *Print PO?* field contains an invalid value: `Print PO Invalid`
- *Fax?* field contains an invalid value: `Fax PO Invalid`
- *Print checks?* field contains an invalid value: `Print Checks Invalid`
- *Drop ship pick* field contains an invalid value: `Drop Ship Output Invalid`
- *Drop ship pick* field contains a *C* or *L*, but the *Use OROB Drop Shipping (H13)* system control value is not selected: `OROB vendor is not allowed`
- *Ship via code* field contains an invalid value: `PO Ship Via Does Not Exist`
- *Factor?* field contains an invalid value: `Vendor Factor Invalid`
- *EDI?* field contains an invalid value: `EDI P/O Invalid`
- *Terms code* field contains an invalid value: `Invalid Terms Code`
- *Type* field contains an invalid value: `Type of Vendor Invalid`
- *Currency code* field contains an invalid value: `Currency Code Invalid`
- *Price currency type* field contains an invalid value: `Vendor Price Currency Invalid`
- *Parent vendor number* contains an invalid value: `Parent Vendor does not exist`
- *Vendor e-mail address* is not formatted correctly (does not include an @ sign prior to a period, with characters between): `Vendor e-mail address Invalid`
- *Remit e-mail address* is not formatted correctly (does not include an @ sign prior to a period, with characters between): `Remit e-mail address Invalid`
- *Email PO* is not set to Y, N, or blank: `Invalid Email PO Flag`

The *Vendor #* for an *A* (add) record type vendor upload record contains a vendor number that already exists in Work with Vendors: `Vendor Already Exists`

A vendor upload record for a *D* (delete) record type exists: `Delete`. This error message does not indicate an error; rather, you use this message as a reminder to manually delete the corresponding vendor record from the Vendor table.

The *Drop ship pick* field is set to *Collaborative Shipping* and the *Use OROB Drop Shipping (H13)* system control value is *unselected*: `Collaborative Shipping vendor is not allowed`

The *Vendor #* for an *M* (modify) or *D* (delete) record type vendor upload record does not exist in the Vendor table: `Vendor Does Not Exist`

Vendor Upload Table (VNDUPL)

Field	Description
Company	The code for the Order Administration company where you wish to upload the vendor upload record. Numeric, 3 positions; required.
Vendor #	A code that identifies a supplier. Numeric, 7 positions; required.
Record type	A code that identifies whether the vendor upload record is an add, change, or delete. Valid values: *A* = Add. The vendor upload record creates a new vendor record. *M* = Modify. The vendor upload record updates an existing record. *D* = Delete. The vendor upload record deletes an existing record. Alphanumeric, 1 position; required.
Vendor name	The name of the vendor or the vendor's company. Updates the Name field in the Vendor table. Alphanumeric, 30 positions; required.
Vendor address line 1	Address line 1 defined for the vendor's address. Updates the Address line 1 field in the Vendor table. Alphanumeric, 32 positions; required.
Vendor address line 2	Address line 2 defined for the vendor's address. Updates the Address line 2 field in the Vendor table. Alphanumeric, 32 positions; optional.
Vendor address line 3	Address line 3 defined for the vendor's address. Updates the Address line 3 field in the Vendor table. Alphanumeric, 32 positions; optional.
Vendor address line 4	Address line 4 defined for the vendor's address. Updates the Address line 4 field in the Vendor table. Alphanumeric, 32 positions; optional.
Vendor city	The city defined for the vendor's address. Updates the City field in the Vendor table. Alphanumeric, 25 positions; required.
Vendor state	The state defined for the vendor's address. Updates the State field in the Vendor table. **Validation** State codes are defined in and validated against the State table. The system requires a state code if the Require state field for the country in the vendor address is selected. Alphanumeric, 2 positions; required.
Vendor zip	The postal code defined for the vendor's address. Updates the Zip field in the Vendor table. Alphanumeric, 10 positions; required.

Field	Description
Vendor country	The country defined for the vendor's address. Updates the Country field in the Vendor table. **Validation** Country codes are defined in and validated against the Country table. Alphanumeric, 3 positions; required.
Vendor contact name	The name of your primary contact at the vendor site. Updates the Contact name field in the Vendor table. Alphanumeric, 30 positions; optional.
Vendor telephone	The vendor's telephone number. Updates the Telephone # field in the Vendor table. Numeric, 11 positions; optional.
Vendor ext	The vendor's telephone number extension. Updates the Extension field in the Vendor table. Alphanumeric, 4 positions; optional.
Vendor fax #	The telephone number for the vendor's fax machine. Faxing is not currently implemented. Updates the Fax number field in the Vendor table. Numeric, 11 positions; optional.
Remit name	The name of the person or company you send payment to for vendor invoices. The remit-to address prints on checks for the vendor. Updates the Remit name field in the Vendor table. Alphanumeric, 30 positions; optional.
Remit address line 1	Address line 1 defined for the remit-to address. Updates the Remit address 1 field in the Vendor table. Alphanumeric, 32 positions; optional.
Remit address line 2	Address line 2 defined for the remit-to address. Updates the Remit address 2 field in the Vendor table. Alphanumeric, 32 positions; optional.
Remit address line 3	Address line 3 defined for the remit-to address. Updates the Remit address 3 field in the Vendor table. Alphanumeric, 32 positions; optional.
Remit address line 4	Address line 4 defined for the remit-to address. Updates the Remit address 4 field in the Vendor table. Alphanumeric, 32 positions; optional.
Remit city	The city defined for the remit-to address. Updates the Remit city field in the Vendor table. Alphanumeric, 25 positions; optional.
Remit state	The state defined for the remit-to address. Updates the Remit state field in the Vendor table. **Validation** State codes are defined in and validated against the State table. The system requires a state code if the Require state field for the country in the vendor address is selected. Alphanumeric, 2 positions; optional.

Field	Description
Remit zip	The postal code defined for the remit-to address. Updates the Remit zip field in the Vendor table. Alphanumeric, 10 positions; optional.
Remit to country	The country defined for the remit-to address. Updates the Country field in the Vendor table. **Validation** Country codes are defined in and validated against the Country table. Alphanumeric, 3 positions; optional.
Print PO?	Indicates whether purchase order forms print for the vendor. If so, you order products on the purchase order, print it, then mail it to the vendor. Updates the Print PO field in the Vendor table. Valid values: *Y* = Print purchase orders for the vendor. *N* = Do not print purchase orders for the vendor.
Fax?	Indicates whether purchase orders should be faxed to the vendor. This option is not currently implemented. Updates the Fax flag field in the Vendor table. **Validation** If you select this field, you must enter a number in the *Vendor fax #* field.
Print checks?	Indicates whether to print checks to the vendor to pay for products or services purchased. Updates the Fax flag field in the Vendor table and the Print checks field in the Vendor table. Valid values: *Y* = Print checks for the vendor. *N* = Do not print checks for the vendor.
Drop ship pick	Indicates whether to process drop ship orders by printing picks, printing purchase orders, or transmitting information through an interface for internet-based drop ship processing. Drop ship merchandise is merchandise you sell but do not stock. Updates the Fax flag field in the Vendor table the Print checks field in the Vendor table.the Drop ship pick field in the Vendor table. Valid values: *P* = Print drop ship picks for the vendor. *O* = Print drop ship purchase orders for the vendor. *L* = Use the Order Orchestration Supplier Direct Fulfillment interface for the vendor. *L* is a valid entry only if the *Use OROB Drop Shipping (H13)* system control value is selected. Alphanumeric, 1 position; required.
Drop ship batch size	The number of picks to include in a drop ship batch when you are *Processing Drop Ship Orders by Batch (MDSB)* for the vendor. The drop ship batch size determines the number of picks that print in one batch before the system creates a new batch. Updates the Drop ship batch size field in the Vendor table. Numeric, 7 positions; optional.

Field	Description
Ship via code	A code that represents the shipper used for shipping merchandise to your company from the vendor. Updates the Ship via code field in the Vendor table. **Validation** Purchase order ship via codes are defined in and validated against the PO Ship Via table; see *Working with Purchase Order Ship Via (WPSV)*. Numeric, 2 positions; optional.
Factor?	Indicates whether you are sending payment to a factor. Updates the Factor field in the Vendor table. Valid values: *Y* = Payment on invoices goes to a factor. *N* = Payment on invoices goes directly to the vendor. If you select this flag, enter the factor's address in the Remit to fields.
EDI?	Indicates whether you transmit purchase order information electronically to the vendor using EDI (Electronic Data Interchange) telecommunications. Valid values: *Y* = Transmit an EDI file with purchase orders to the vendor. *N* = Do not use EDI. If you select this flag, the *Wait for ASN?* field and *Include hold?* field default to unselected. Updates the EDI file field in the Vendor table.
Wait for ASN?	Indicates you would like to wait for Advanced Shipment Notice from the EDI service provider. Not currently implemented.
Include hold?	Indicates you would like to include held invoices in the EDI transmission. Not currently implemented.
EDI file	The EDI file used for EDI transmission. Not currently implemented. Alphanumeric, 10 positions; optional.
Terms code	A code for the terms and conditions for payment to the vendor, such as 30 days after invoice date or at the end of the month. **Validation** Term codes are defined in and validated against the Terms table. Updates the Code field in the Terms table. Numeric, 2 positions; optional.
Disc% (Primary discount percentage)	The primary discount percentage applied towards items purchased from the vendor. Updates the Discount % field in the Vendor table. Numeric, 5 positions with a 2-place decimal; optional.
Surcharge%	A standing surcharge added to purchases from the vendor. Updates the Surcharge % field in the Vendor table. Numeric, 5 positions with a 2-place decimal; optional.
Rating	The vendor's quality rating. Updates the Rating field in the Vendor table. Numeric, 5 positions with a 2-place decimal; optional.

Field	Description
Interface vendor code	The vendor code on your third party A/P system. Updates the Interface vendor code field in the Vendor table. Alphanumeric, 10 positions; optional.
Parent vendor number	A code for the company that is made up of one or more subsidiary vendors. If your unique interface program supports it, you can define a vendor as a parent vendor if you wish to pay the main (parent) vendor for the merchandise you receive from each subsidiary (child) vendor. 1. If the vendor code defined in this field matches the code from the *Vendor #* field, the vendor represents a parent vendor. 2. If the vendor code defined in this field does not match the code from the Vendor # field, the vendor represents a child vendor. Updates the Parent vendor number field in the Vendor Extended table. Numeric, 7 positions; optional.
Currency code	A code to identify the vendor's currency type. If you leave this field blank, the *Local Currency Code (A55)* system control value defaults. **Validation** Currency codes are defined in and validated against the Currency Code table; see *Working with Currency (WCUR)*. Updates the Currency code field in the Vendor table. Alphanumeric, 3 positions; optional.
Price currency type	Indicates whether the prices from the vendor are in the system's currency or the vendor's currency and controls how and when currency conversion takes place. Updates the Price currency type field in the Vendor table. Valid values: *S* = System currency. The price from the Vendor Item table is in your local currency. *V* = Vendor currency. The price in the Vendor Item table is in the vendor's currency. *N* = No conversion. The price in the Vendor Item table is in the current currency. Alphanumeric, 1 position; required.
VAT number	The tax ID number defined for the vendor; this field is informational-only. Updates the VAT number field in the Vendor table. Alphanumeric, 20 positions; optional.
Type	Identifies whether the vendor is an actual vendor or a manufacturer. Valid values are: *M* = The person is a manufacturer. *V* = The person is a vendor. Updates the Type field in the Vendor table. Alphanumeric, 1 position; required.

Field	Description
EFT account #	The electronic fund transfer account number for this vendor. Updates the EFT account # field in the Vendor table. Alphanumeric, 20 positions; optional.
Vendor e-mail address	The email address for the vendor. If the *Email Purchase Order (K80)* system control value is selected, you can send purchase orders to the vendor by email. See that system control value for more information. Required if the *Email PO* flag is set to *Y*. Updates the E-mail address field in the Vendor table. Alphanumeric, 50 positions; optional.
Remit e-mail address	The e-mail address defined for the remit-to address. Updates the Remit e-mail address field in the Vendor table. Alphanumeric, 50 positions; optional.
User field 1	Additional vendor information. Updates the User field 1 field in the Vendor table. Alphanumeric, 10 positions; optional.
User field 2	Additional vendor information. Updates the User field 2 field in the Vendor table. Alphanumeric, 10 positions; optional.
User field 3	Additional vendor information. Updates the User field 3 field in the Vendor table. Alphanumeric, 10 positions; optional.
Vendor upload error	The error message associated with the vendor upload record. The Vendor Upload batch process assigns an error message to a vendor upload record if the record contains an error; vendor upload records in error display on the *Vendor Upload Error Report*. Vendor upload records that contain an error are not uploaded to the Order Administration Vendor table. You need to correct the error and resubmit the vendor upload batch process or delete the vendor upload record. Alphanumeric, 60 positions; optional.
Email PO	Indicates whether to send purchase orders to the vendor by email. Valid values are: *Y* = Send purchase orders to the vendor through email. If this field is set to *Y*, then the *Vendor e-mail address* must contain a valid email address. *N* = Do not send purchase orders by email. Updates the Email PO field in the Vendor table. If this field is not populated, the vendor upload program sets the field in the Vendor table to *N*. Emailing purchase orders is available only if the *Email Purchase Order (K80)* system control value is selected. See that system control value for more information.

Work with Item/SKUs (MITM)

For information on:	See:
Creating **new items**	Performing Initial Item Entry (MITM)
Reviewing and working with **existing items**, with links to **additional options**	Working with Existing Items (MITM)
Working with **SKUs**	Working with SKUs
Working with **item or SKU offer** records and set up price breaks, aliases, and accompanying items	Assigning Items/SKUs to Offers
Working with **item warehouse and item location** records	Assigning Items to Warehouses
Working with **additional item options**, including comments, source prices, item coordinates, UPC codes, and item categories	Entering Additional Item Information
Set up **eligible shippers** for an item	*Working with Item Ship Via Overrides*
Copying item information from an existing item to a newly-created item	*Copying Items*

Creating and Working with Items

Purpose: The following chapters describe how to create and work with items.

- Performing Initial Item Entry (MITM) describes selecting items, creating items, creating item (base information), creating offers, and creating SKUs with overrides.
- Working with Existing Items (MITM) includes scanning, changing, deleting, and displaying items that have been created.
- Working with SKUs defines split SKU elements, SKU groups, and the SKU generator. This topic includes how to scan for, change, delete, and display SKUs.
- Assigning Items/SKUs to Offers includes how to work with item/SKU offers, price breaks, page letters, aliases, and accompanying items.
- Assigning Items to Warehouses discusses item warehouse information and item location information.
- Entering Additional Item Information describes comments and source prices.
- Working with Item Tax Exemptions (WITX) describes how to set up tax exemptions or exceptions for specific items or item classes by location.
- Working with GST Tax Exemption Status (MGTX) describes how to set up tax exemptions or exceptions for specific items by Canadian province.
- Updating Harmonize Codes (UPHC) describes how to update harmonize codes quickly for multiple items or SKUs.

- Working with Freight Exempt Items (WFEI) describes how to exclude items from freight.
- *Working with Item Ship Via Overrides* describes how to set up eligible shippers for an item.
- *Working with Item Coordinate Types (WICT)* describes how to create and work with item coordinate types.
- *Copying Items* describes how to copy item information from one item to a newly created item in the same company or copy item information from one item to another item, with the same item number, in one or more shared companies.

Working with Item Coordinates (WCIO)

Overview: Use the *Work with Item Coordinates Screen* to specify related items or SKUs for a selected item, so that when a customer orders the primary item you can cross-sell the coordinates. For example, if you sell a blazer, you might also sell a related skirt, blouse, and scarf.

In this topic:

- *About Item Coordinates*
- *Item Coordinate Creation Summary*
- *Work with Item Coordinates Screen*
- *Change Item Coordinate Screen*
- *Copy Coordinate Item Pop-Up Window*
- *Work with SKU Coordinates Screen*
- *Create SKU Coordinate Screen*
- *Select SKU Coordinates Screen*

About Item Coordinates

Setting up a primary item and coordinates: The item you select at the *Work with Items Screen*, and match related items to, is the "primary item"; the related items are "coordinate items." Item coordination does not automatically work in both directions; in other words, designating a skirt as a coordinate to a blazer does not automatically designate the blazer as a coordinate to the skirt. You must select the Work with Item Coordinates option for each item that you would like to designate as a primary item, and then select the related coordinates for cross-selling.

Order entry: When you enter an order for an item that is associated with any item coordinates:

- If the *Automatically Display Coordinate Items in Order Entry (I53)* system control value is *selected* and the *Promo* flag for the order type is set to *Promo Price,* you advance to the *Display Coordinate Items Window* when you add an item associated with coordinate items to an order.
- If the *Automatically Display Coordinate Items in Order Entry (I53)* system control value is *unselected* or blank, a coordinate message indicates when you add an item associated with coordinate items to an order: `Coordinate items exist for base item entered`. You select *Coordinates* for the primary item to advance to the *Display Coordinate Items Window*.

The system will cross-sell coordinates even if the primary item is soldout, on backorder, is a drop ship item, non-inventory item, or main set item. Additionally, the system will cross-sell coordinates that are a drop ship item, non-inventory item, or main set item.

For more information: See the *Automatically Display Coordinate Items in Order Entry (I53)* system control value for a discussion on when screens prompt you to add coordinate items in Classic View and Modern View.

Pricing: When you add an item coordinate to an order, the system selects a price the same way as if you had entered the item at an ordinary order line. If the system cannot find a price for the item coordinate, you will not be able to add it to the order from the item coordinate pop-up window.

Auto linking: The *SKU Element for Auto Linking Coordinates (F39)* system control value controls which coordinates the system creates automatically when you specify a SKUed item to coordinate with a primary item at the *Work with Item Coordinates Screen* (you can also select any SKU of an item or a non-SKUed item manually; see below for more information). For example, SKU element one is color, and you set this system control value to *1* so that auto linking will be based on color. When you enter an item to coordinate at the *Work with Item Coordinates Screen*, the system will create coordinate records only for SKUs of the coordinate that find a color match with SKUs of the primary item.

Example:

Item AB100 (blazer), primary item, sold in colors NAVY, WHIT and BLCK, sizes SMLL, MEDM, LRGE

Item BB100 (skirt), coordinate item, sold in colors NAVY, BLCK, and PURP, sizes 6, 8, 10, 12, 14

SKU element 1 (color) specified as SKU element to use for auto linking

Result: System automatically creates item coordinate records for item BB100 in the following SKUs, because SKU element 1 finds a match with AB100's SKU element 1:

- NAVY 6, 8, 10, 12, 14
- BLCK 6, 8, 10, 12, 14

Contact Center: You can also select coordinate items to add to an order in Contact Center; however, the *Automatically Display Coordinate Items in Order Entry (I53)* system control value does not apply in Contact Center. See the Select Coordinate Items page in the Modern View online help for more information.

Selected SKU values: You also have the option at the *Work with Item Coordinates Screen* to create coordinate records for a specific SKU value of the primary item only. In the example above, for instance, you could indicate that you want to create coordinates only for SKUs whose first SKU element, color, is set to NAVY.

> **Important:**
>
> The item coordinates are associated with the base primary item, and are not restricted to the individual, matching SKUs. In the above example, each coordinate SKU you create for the skirt would be associated with all SKUs of the blazer. If you enter an order for the blazer in white, size 12, you will still be able to select the skirt in navy, size 10, as a coordinate. However, you can control which SKUs display in order entry through the *SKU Element for Order Entry Filtering (F40)* system control value.

Manual linking: In addition to auto linking, you can also relate a primary item to any SKUed or non-SKUed coordinate item, even if there is no match in the selected SKU element.

Example:

Additional item coordinates for item AB100:

Item CB100 (blouse) available in WHIT and PINK, sizes 6,8, 10, 12, 14

Item DB100 (scarf), a non-SKUed item

Since the above items and SKUs do not match the selected SKU element of the primary item, you would create the item coordinate records manually, and so are not restricted to the item coordinates the system creates automatically.

Item Coordinate Creation Summary

The following table summarizes the guidelines for creating item coordinates for a SKU and a non-SKUed primary item:

Primary Item is:	Coordinate Item is:	Result:
SKUed	SKUed	*If you specify a matching SKU:* Creates coordinates only for SKUs of the coordinate item that match your entry. However, if your entry doesn't find a matching SKU for the primary item, no coordinate SKUs are created. *If you do not specify a matching SKU:* Selects only SKUs that exist for both the primary item and the coordinate item to create as coordinates SKUs
non-SKUed	SKUed	You cannot create an item coordinate at the Work with Item Coordinates screen; instead, you must *Select Items* to advance to the Select SKU Coordinates screen.
SKUed or non-SKUed	non-SKUed	Creates the item coordinate for the non-SKUed item.

Create by offer: You can also use the Work with Coordinates by Offer menu option (*WCIO*) to set up coordinates for a primary item. This menu option restricts the display and creation of coordinate items to those that are in the same offer as the primary item. Additionally, the alias for each item, if any, is displayed, and you can enter the alias rather than the actual item code.

Work with Item Coordinates Screen

How to display this screen: Select *Coordinates* for an item at the *Work with Items Screen*, or enter *WCIO* in the Fast path field at the top of any menu and complete the Item and Offer fields.

Field	Description
Primary item	The item you are relating coordinates to. This is the item you selected at the Work with Items Screen. **Note:** Item coordinates are related to the base item; you will be able to select item coordinates in order entry if you enter an order line for any SKU of the primary item. Alphanumeric, 12 positions; display-only.
Description (unlabeled field)	The description of the primary item. Alphanumeric, 120 positions; display-only.
Coordinate item	Use this field to enter the related item you are coordinating to the primary item for cross-selling purposes. Item codes are defined in and validated against the Item table. Alphanumeric, 12 positions. Work with: required. Change: display-only.
Matching SKU	The SKU element specified in the *SKU Element for Auto Linking Coordinates (F39)* system control value. Included only if the primary item is a SKUed item. *Enter a SKU value* here if you want to create item coordinates only for SKUs that match your entry. There must also be a match for the SKU value for the primary item. In other words, if this field represents color and you enter *NAVY*, the system validates that there are SKUs of both the primary item and coordinate item whose color is *NAVY*, and creates item coordinate records for the *NAVY* SKUs only. *Leave this field blank* to have the system automatically create item coordinates for each SKU of the coordinate item whose SKU value matches a SKU for the primary item. See the discussion earlier in this topic for examples. Alphanumeric, 4 positions; optional.
Coordinate type	A code representing a type of item coordinate, such as mandatory or optional. Coordinate type codes are defined in and validated against the Item Coordinate Type table; see *Working with Item Coordinate Types (WICT)*. Alphanumeric, 2 positions; optional.
Message	A persuasive or descriptive message to display on the item coordinate pop-up window in order entry. Alphanumeric, 70 positions; optional.
Coordinate	To scan, enter a full or partial item code to display existing coordinates for the primary item that match your entry. Alphanumeric, 12 positions; optional.

Field	Description
Description	The description of the coordinate, from the Item table record for the coordinate item. Alphanumeric, 120 positions; display-only.
Seq (sequence)	The sequence number assigned to the item coordinate type, indicating the sequence in which coordinate items assigned to this type display on the Display Coordinate Items window in order entry. If you change the sequence number assigned to a coordinate type in *Working with Item Coordinate Types (WICT)*, the system does not automatically update the sequence number for item coordinates that are assigned to the coordinate type. For example, if the sequence number for coordinate type *R* is *3*, any item assigned to coordinate type *R* will have a sequence number of *3*. If you change the sequence number for coordinate type *R* from *3* to *5*, any items assigned to coordinate type *R* will still have a sequence number of *3*. To update the sequence number assigned to coordinate items, select *Submit Update* at the *Work with Item Coordinate Type Screen*. See *Updating Coordinate Type Sequence* for more information. Numeric, 3 positions; display-only.
Type	A code representing the coordinate type assigned to the coordinate item, such as mandatory or optional. Coordinate type codes are defined in and validated against the Item Coordinate Type table; see *Working with Item Coordinate Types (WICT)*. Alphanumeric, 2 positions; display-only.

Creating item coordinates: Follow the steps below to create item coordinates for the primary item.

1. Enter the base item code of the item you want to coordinate with the primary item.
2. Optionally, enter the matching SKU value if you want to create only the item coordinate SKUs that match this value. This field is available only if the primary item has SKUs.
3. Optionally, enter a coordinate type code if you want to control the sequence in which coordinate items display on the Display Coordinate Items window in order entry.
4. Optionally, enter a message to display at the pop-up window in order entry.
5. Select *OK*. The system validates your entries and highlights any fields you need to correct. See below for more information.
6. When no errors exist, the system creates a record for the base item coordinate in the Item Coordinate table, and a record for each matching SKU of the item coordinate in the SKU Coordinate table. A message such as the following indicates: `Coordinate items created = 1. Coordinate SKUs created = 20.`

The number of coordinate items created will always be *1*. In the case of non-SKUed coordinates, the number of SKUs will be *1* also.

Correcting errors:

- *Coordinate item errors:* If the coordinate item you entered does not exist, a message such as the following indicates: `Item (AB1000) does not exist`.
- If the coordinate item you entered does not have any SKUs that match your entry in the Matching SKU field, a message such as the following indicates: `SKU element (WHIT) does not exist for item (AB1000)`.

Correct the coordinate item information.

- *Matching SKU errors:* If your entry in the Matching SKU field does not match any of the SKUs for the primary item, or if there are no matching SKUs for the primary and coordinate item based on the selected SKU element, a message such as the following indicates: `Coordinate item (ANGELSET) has no matching SKUs to primary item - use F7`.

Select *Select Items* to advance to the *Select SKU Coordinates Screen*, where you can select any item or SKU to create as an item coordinate.

Screen Option	Procedure
Change an item coordinate	Select *Change* for an item coordinate to advance to the *Change Item Coordinate Screen*.
Delete an item coordinate and all of its related SKUs	Select *Delete* for an item to delete it. The Confirm Delete window opens; select *OK* to delete the coordinate and its SKUs.
Work with SKUs for an item coordinate	Select *Work with SKU coordinates* for an item coordinate to advance to the *Work with SKU Coordinates Screen*.
Copy the coordinates for one primary item to another	Select *Copy* to display the *Copy Coordinate Item Pop-Up Window*.
Select additional items or SKUs to coordinate to the primary item	Select *Select Items* to advance to the *Select SKU Coordinates Screen*.

Change Item Coordinate Screen

To change: Select *Change* for a coordinate item at the *Work with Item Coordinates Screen* to advance to the Change Item Coordinate screen. You can change the Coordinate type and Message fields. See *Work with Item Coordinates Screen* for field descriptions.

Coordinate types:

- If the sequence number for the coordinate type assigned to the item coordinate has since been updated to a new sequence number, the system will automatically update the item coordinate to the new sequence number when you advance to this screen.
- If the coordinate type that is assigned to the item coordinate has since been deleted, you will receive an error message at this screen: `Item Coordinate Type not found`.

Copy Coordinate Item Pop-Up Window

Purpose: Use this window to copy the items and SKUs coordinated with the current primary item to a new primary item.

How to display this window: Select *Copy* at the *Work with Item Coordinates Screen*.

To copy: Enter the code of the item to be associated with the same coordinate items and SKUs as the “copy from” primary item. The code you enter must represent a valid item in your company.

The confirm prompt window opens. Select to confirm the copy; otherwise, select *Exit* to cancel.

Work with SKU Coordinates Screen

Purpose: Use this screen to work with the SKUs of an item that are currently coordinated with the primary item, or to coordinate additional SKUs.

When you first advance to this screen, the screen will be blank since you have not yet created any SKU coordinates.

How to display this screen: Select *Work with SKU Coordinates* for a SKUed coordinate item at the *Work with Item Coordinates Screen*.

Field	Description
Primary item	The item you are relating coordinates to. This is the item you selected at the *Work with Items Screen*. Alphanumeric, 12 positions; display-only.
Description	The description of the primary item. Alphanumeric, 120 positions; display-only.
Coordinate item	The base item for which you are defining coordinate SKUs. Alphanumeric, 12 positions; required.
Description	The description of the coordinate item. Alphanumeric, 120 positions; display-only.
SKUs	The item's unique characteristics, such as its color or size. Alphanumeric, three 4-position fields; display-only.
Description	The description of the SKU. Alphanumeric, 40 positions; optional.

Screen Option	Procedure
Create a new SKU coordinate for the primary item	Select *Create* to advance to the *Create SKU Coordinate Screen*.
Delete a SKU coordinate	Select *Delete* for a SKU to delete it.

Create SKU Coordinate Screen

Purpose: Use this screen to add a new SKU to an item coordinate.

Create a SKU coordinate: Complete the three 4-position fields to create a new SKU coordinate for the primary item. You can prompt on the SKU field to display a list of valid SKUs for the base item.

A message such as the following indicates: `Coordinate SKU created for primary item (BU001).`

How to display this screen: Select *Create* at the *Work with SKU Coordinates Screen*.

Field	Description
Primary item	The code and description of the primary item for which you are creating coordinates. Item: Alphanumeric, 12 positions; display-only. Description: Alphanumeric, 120 positions; display-only.
Coordinate item	The code and description of the base item for which you are defining SKU coordinates. Item: Alphanumeric, 12 positions; display-only. Description: Alphanumeric, 120 positions; display-only.
SKU	The item's unique characteristics, such as its color or size. Alphanumeric, three 4-position fields; display-only.

Select SKU Coordinates Screen

Purpose: Use this screen to select SKUs to coordinate with a primary item. You can also use this screen to select additional SKUs of a coordinate item that already has one or more SKUs selected to coordinate with the primary item.

You can also use the *Work with SKU Coordinates Screen* to create additional coordinated SKUs of a coordinate item.

How to display this screen: Select *Select Items* at the *Work with Item Coordinates Screen*.

Field	Description
Primary item	The code and description of the item you are relating coordinates to. This is the item you selected at the *Work with Items Screen*. Item code: Alphanumeric, 12 positions; display-only. Item description: Alphanumeric, 120 positions; display-only.
Msg (Message)	Enter the descriptive or persuasive message for the system to assign to each item or SKU you add as a coordinate. Alphanumeric, 70 positions; optional.
Coord item (Coordinate item)	The items and SKUs available to link to the primary item as coordinates. Alphanumeric, 12 positions; required.
SKU	The item’s unique characteristics, such as its color or size. Alphanumeric, three 4-position fields; display-only.
Description	The description of the SKU. Alphanumeric, 40 positions; optional.
Categ (Item category)	The category associated with the item. You can use item category to associate items that are related to or compatible with one another, both for selection in order entry and for reporting. Alphanumeric, 4 positions; optional.

To select an item or SKU: To select one or more items or SKUs to coordinate with the primary item:

1. Optionally, enter a descriptive message in the Message field for the item that you are adding as a coordinate to the primary item.

2. Optionally, use the Coordinate item, Description, and Category scan fields to position to the desired item.
3. Select the item/SKU you would like to add as an item coordinate to the primary item. The system adds the item/SKU as a coordinate and returns you to the *Work with Item Coordinates Screen*, where the newly created item coordinate displays.

> **Note:**
>
> No message indicates that your selections have been added to the Item Coordinate or SKU Coordinate tables; similarly, no error message indicates if you select an item or SKU that is already designated as a coordinate to the primary item.

Working with Item Tax Exemptions (WITX)

Purpose: Use the Item Tax Exemptions function to define tax exemptions for items based on their tax status in certain U.S. states. You can define the exemption for individual items or classes of items; exemptions can specify that items are either taxable or tax exempt, whichever is the exception to the norm. The item tax exemptions function also lets you define a dollar level at which an item's tax status changes.

For instance, you would use this function if:

- a class of apparel you sell is taxable only in three states
- a particular item is taxable only up to a certain dollar amount
- with few exceptions, your merchandise is taxable in all states

> **Note:**
>
> If you use an external tax system, the item tax exemptions you set up with this function are not used. You must set up all tax exemptions in the tax system. See *Vertex Setup* and *Avalara AvaTax Setup*.

In this topic:

- *Work with Item Tax Exemptions Screen*
- *Create Item Tax Exemption Screen*
- *Change Item Tax Exemptions Screen*
- *Display Item Tax Exemption Screen*

For more information: You can create tax exemptions and exceptions for items in Canadian provinces through *Working with GST Tax Exemption Status (MGTX)*. You can use the Work with Items/SKUs menu option to flag an item as VAT-exempt; see *Create Item (Base Information) Screen* or *Create SKU 1 of 2 (With Overrides) Screen*.

Work with Item Tax Exemptions Screen

How to display this screen: Enter *WITX* in the Fast path field at the top of any menu, or select this option from a menu.

Field	Description
St (State)	A code that represents the state where an item tax exemption applies. State codes are defined in and validated against the state table, which is accessible through the Work with Countries menu option; see *Setting Up the Country Table (WCTY)*. Alphanumeric, 2 positions; optional.
Cmp (Company)	A code that represents the company carrying the item. The code of the current company appears in this field as the default. Numeric, 3 positions; optional.
Class	A code that represents a group of similar items. Alphanumeric, 3 positions; optional.
Item	A code representing a unit of inventory. Alphanumeric, 12 positions; optional.
Exempt	This code represents whether the item is tax exempt. Valid values are: *selected* = The item is tax exempt. *unselected* = The item is not tax exempt.
Tax Value	The dollar value up to which the item is taxable. If the value in the Exmpt field is *N*, the portion of the item price up to this value taxable; the portion of the item price above this value is tax exempt. Numeric, 13 positions with a 2-place decimal; optional.
No Tax Value	The dollar value that is tax exempt. If the value in the Exmpt field is *N*, and the item price is this value or less, the item is tax exempt; if the item price greater than this value, then the amount of the item price that exceeds this value is taxable. Numeric, 13 positions with a 2-place decimal; optional.

Screen Option	Procedure
Change an item tax exemption	Select *Change* for a tax exemption to advance to the *Change Item Tax Exemptions Screen*.
Delete an item tax exemption	Select *Delete* for a tax exemption to delete it.
Display an item tax exemption	Select *Display* for a tax exemption to advance to the *Display Item Tax Exemption Screen*.
Create an item tax exemption	Select *Create* to advance to the *Create Item Tax Exemption Screen*.

Create Item Tax Exemption Screen

Purpose: At the *Work with Item Tax Exemptions Screen*, select *Create*.

Field	Description
Country	A code that represents the country in which an item tax exemption occurs. Country codes are defined in and validated against the Country table; see *Setting Up the Country Table (WCTY)*. Alphanumeric, 3 positions; required.
State	A code that represents the state in which an item tax exemption applies. State codes are defined in and validated against the state table, which is accessible through the Work with Countries menu option; see *Setting Up the Country Table (WCTY)*. Alphanumeric, 2 positions. Create screen: required. Change screen: display-only.
Company	A code that represents the company you are currently working with. Numeric, 3 positions; display-only.
Item class	A code that represents a group of similar items. Item class codes are defined in and validated against the Item Class table. See *Working with Item Classes (WICL)*. Alphanumeric, 3 positions; optional.
Item	A code representing a unit of inventory. Item codes are defined in and validated against the Item table. **Note:** You can select either an item class or an item, but not both. Alphanumeric, 12 positions; optional.
Exempt	A code indicating whether the item is tax exempt. Valid values are: *Selected* = The item is tax exempt. The system does not use the Tax value or No tax value entries at this screen. *Unselected* = The item is not tax exempt. The system uses the Tax value and No tax value entries at this screen to determine the amount of tax to charge.

Field	Description
Tax value	The dollar value up to which the item is taxable. The portion of the item price above this value is tax exempt. The value in the Exempt field must be *unselected* for this field to work. *Example:* You sell an item for $250.00, and its Tax value is $200.00. If the regular tax rate is 5%, the system charges tax for the Tax value of $200.00, or $10.00. The remaining $50.00 that exceeds the Tax value of $200.00 is not taxed. **Note:** You cannot enter both a Tax value and a No tax value. Numeric, 13 positions with a 2-place decimal; optional.
No tax value	The dollar value that is tax exempt. If the item price is this value or less, the item is tax exempt; if the item price is greater than this value, then the amount of the item price that exceeds this value is taxable. The value in the Exempt field must be *unselected* for this field to work. *Example:* You sell an item for $250.00, and its No tax value is $200.00. If the regular tax rate is 5%, the system charges tax for the $50.00 that exceeds the No tax value, or $2.50. The first $200.00 is not taxed. **Note:** You cannot enter both a Tax value and a No tax value. Numeric, 13 positions with a 2-place decimal; optional.

Change Item Tax Exemptions Screen

To change: Select *Change* for an item tax exemption at the *Work with Item Tax Exemptions Screen* to advance to the Change Item Tax Exemption screen. You can change any field at this screen except the State or Company. See *Create Item Tax Exemption Screen* for field descriptions.

Display Item Tax Exemption Screen

To display: Select *Display* for an item tax exemption record at the *Work with Item Tax Exemptions Screen* to advance to the Display Item Tax Exemption screen. You cannot change any information on this screen. See *Create Item Tax Exemption Screen* for field descriptions.

Working with GST Tax Exemption Status (MGTX)

Purpose: Use the GST Tax Exemption Status to define tax exemptions for items based on their status in particular provinces.

Overview: The Canadian GST (Goods and Service Tax) is a federal tax; the PST (Provincial Services Tax) is a province-level tax. You can use Order Administration to calculate either, both, or neither of these taxes based on the shipping address on the order.

You can specify a GST rate:

- as a default in the System Control table
- for each SCF in the SCF table
- for each postal code in the Postal Code table

You can specify a PST rate:

- for each SCF in the SCF table
- for each postal code in the Postal Code table

The GST rate from the SCF table, if any, overrides the rate from the System Control table, and the GST or PST rates from the Postal Code table, if any override the rates from the SCF table.

In addition to defining rates for each of these taxes, you must define a method for computing them. You define these methods in the SCF and, optionally, the Postal Code tables. To define specific items as exceptions to the PST and GST methods for a province, you use the Work with GST Tax Exemption Status function.

You can also define an exemption or exception for a specific customer. See *Working with Customer Tax Status*.

For more information:

- *Working with SCF Codes (WSCF)*
- *Setting Up the Zip/City/State (Postal Code) Table (WZIP)*
- item exemptions in U.S. states: *Working with Item Tax Exemptions (WITX)*.

> **Note:**
>
> If you are using this function to define tax exceptions for items, you should set the *GST Item Status Default (A91)* system control value to *B* (calculate both GST and PST tax).

In this topic:

- *Calculation Methods and Exemptions*
- *If You Tax Freight and Handling*
- *Work with GST Tax Exemption Status Screen (Selecting an Item)*
- *Work with GST Tax Exempt Status Screen*
- *Create GST Tax Exempt Status Screen*

Calculation Methods and Exemptions

To understand the effect of different tax exemptions, it is useful to look at the calculation methods that may apply to GST and PST.

Method	Description	Calculation/Example (where the order total subject to tax =	Example with Exemption Type of G or P
G	Calculate the GST on the order, including freight and handling, if applicable. Add this amount to the order total, then calculate the PST on the result.	*Calculation:* `ORDER * GST rate = GST amount` `GST amount + ((GST amount + ORDER) * PST rate) = order tax` *Example*: The order total subject to tax = $10.00 `GST rate = 10%` `PST rate = 5%` `$10 * 10% = $1.00 GST amount` `$1 GST amount + (($1 + $10) * 5%) = $1 + ($11 * 5%) = $1.60`	*G* = GST only; the amount subject to PST is 0 *Example*: `$10 * 10% = $1.00 GST amount` `$1 GST amount + (($1 + 0) * 5%) = $1 + ($1 + 5%) = $1.05` *P* = PST only; the amount subject to GST is 0 *Example*: `0 * 10% = 0 GST amount` `0 GST amount + ((0 + $10) * 5%) = 0 + ($10 * 5%) = $.50`
P	Calculate the PST on the order, including freight and handling, if applicable. Add this amount to the order total, then calculate the GST on the result.	*Calculation*: `O * PST rate = PST amount` `PST amount + ((PST amount + O) * GST rate) = order tax` *Example*: (with same assumptions as above) `$10 * 5% = $.50 PST amount` `$.50 PST amount + (($.50 + $10) * 10%) = $.50 + ($10.50 * 10%) = $1.55`	*G* = GST only; the amount subject to PST is 0 *Example*: `0 * 5% = 0 PST amount` `0 PST amount + ((0 +$10) * 10%) = 0 + ($10 * 10%) = $1.00` `P = PST only; the amount subject to GST is 0` *Example*: `$10 * 5% = $.50 PST amount` `$.50 PST amount + (($.50 + 0) * 10%) = $.50 + ($.50 * 10%) = $.55`
S	Calculate GST and PST separately; neither tax is subject to the other.	Calculation: `(O * GST) + (O * PST)` *Example*: (with same assumptions as above `($10 * 10%) + ($10 * 5%) =` `$1 + $.50) = $1.50`	*G* = GST only; the amount subject to PST is 0 *Example*: `(0 * 10%) + ($10 * 5%) = $.50` *P* = PST only; the amount subject to GST is 0 Example: `($10 * 10%) + (0 * %) = $1.00`

If You Tax Freight and Handling

You can tax freight and handling on orders as well as merchandise. In order to tax freight and/or handling, you must *select* the *Tax on Freight (B14)* and/or *Tax on Handling (B15)* fields in the System Control table. You must then *select* the corresponding fields in the SCF or Postal Code tables for the location where you tax freight or handling as well.

An item tax exemption by province affects the calculation of tax on freight and handling for items shipped to that province. Assuming that GST and PST normally apply to the order, the system uses the following logic to calculate tax on freight and handling:

Order-level freight method:

- If all items on the order are exempt from PST, the system does not calculate PST on freight or handling.
- If at least one item on the order is subject to PST, the system calculates PST on freight and handling.
- If all items on the order are exempt from GST, the system does not calculate GST on freight or handling.
- If at least one item on the order is subject to GST, the system calculates GST on freight and handling.

Line-level freight method:

- If the item is exempt from PST, the system does not calculate PST on freight or handling for that line.
- If the item is exempt from GST, the system does not calculate GST on freight or handling for that line.
- If the item is subject to PST, the system calculates PST on freight and handling for that line.
- If the item is subject to GST, the system calculates GST on freight and handling for that line.

The system determines the freight method on an order from the source code. See *Working with Source Codes (WSRC)*.

You can also flag a special handling code as exempt from tax. See *Establishing Additional Charge Codes (WADC)*.

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Work with GST Tax Exemption Status Screen (Selecting an Item)

Use this screen to select an item for creation, review, change or deletion of GST tax exemption status.

How to display this screen: Enter *MGTX* in the Fast path field at the top of any menu or select Work with GST Tax Exemption Status from a menu.

Item field: Use the item field to enter the item code that you want to work with. This is a 12-position, alphanumeric field. Item codes are defined in and validated against the Item table; see *Performing Initial Item Entry (MITM)*.

Work with GST Tax Exempt Status Screen

Purpose: Use this screen to select an item tax exemption by province to work with, or to create a new record.

How to display this screen: Enter a valid item code at the *Work with GST Tax Exemption Status Screen (Selecting an Item)*.

Field	Description
Item	The code that represents the item subject to tax exemption by province. Item codes are defined in and validated against the Item table; see *Performing Initial Item Entry (MITM)*. Alphanumeric, 14 positions; display-only.
Item description (Unlabeled field to the right of the item code)	The description associated with the item. Alphanumeric, 120 positions; display-only.
Prov (Province)	A code that represents the province where a tax exemption applies for this item. Alphanumeric, 2 positions; optional.
Sts (Status)	A code that represents the override tax status for the item in this province. Valid values are: • *Both* = Calculate both GST and PST • *GST* = Calculate GST only • *Neither* = Calculate neither GST or PST • *PST* = Calculate PST only Optional.

Screen Option	Procedure
Change GST tax exemption	Select *Change* for a province to advance to the Change GST Tax Exemption Status Screen. See the *Create GST Tax Exempt Status Screen* for field descriptions.
Delete a GST tax exemption	Select *Delete* for a province to delete it.
Display a GST tax exemption	Select *Display* for a province to advance to the Display GST Tax Exempt Status Screen. See the *Create GST Tax Exempt Status Screen* for field descriptions.
Create a tax exemption record	Select *Create* to advance to the *Create GST Tax Exempt Status Screen*.

Create GST Tax Exempt Status Screen

Purpose: At the *Work with GST Tax Exempt Status Screen*, select *Create*.

Field	Description
Item	The code that represents the item subject to tax exemption by province. Item codes are defined in and validated against the Item table. Alphanumeric, 14 positions; display-only.
Item description (Unlabeled field to the right of the item code)	The description associated with the item. Alphanumeric, 120 positions; display-only.

Field	Description
Province	A code that represents the province where a tax exemption applies for this item. Alphanumeric, 2 positions. Create screen: required. Change screen: display-only.
Override tax status	A code that represents the override tax status for this item in this province. Valid values are: • *Both* = Calculate both GST and PST • *GST* = Calculate GST only • *Neither* = Calculate neither GST or PST • *PST* = Calculate PST only Required.

Updating Harmonize Codes (UPHC)

Purpose: Use the Update Harmonize Codes function to update harmonize codes quickly for multiple items or SKUs.

The system uses an item's harmonize code to determine whether to add a duty charge to an order. Duty is a tax that you may be required to add to orders shipping to certain countries. The system performs the following checks to determine whether to add duty for an item a customer orders:

The system checks the duty rates defined for the country on the order's shipping address. If the system finds a duty rate whose harmonize code matches the item's harmonize code, it adds the duty amount or percentage to the order. Two blank records are a match; that is, if both the item's and the duty rate's harmonize codes are blank, the system will add the duty to the order. See *Setting Up the Country Table (WCTY)* for more information on setting up duty rates for countries.

For more information: You can also update harmonize codes through the Work with Items/SKUs option; see *Performing Initial Item Entry (MITM)*.

Update Harmonize Codes Screen

Use this screen to update the harmonize codes of multiple items and SKUs quickly.

How to display this screen: Enter *UPHC* in the Fast path field at the top of any menu or select Update Harmonize Codes from a menu.

Field	Description
Item	A code representing a unit of inventory that you sell. Items are defined in and validated against the Item table; see *Performing Initial Item Entry (MITM)*. Alphanumeric, 12 positions; required.

Field	Description
Harmonize code	A code that prints on customers documents for international shipments. The system determines whether to add duty charges to an order by comparing an item's harmonize code with the harmonize codes associated with the duty rates for the customer's country. You can also create, change, delete or display an item's harmonize code on the second screen in Work with Items for a non-SKU'd item, or on the SKU screen for SKU'd items; see *Performing Initial Item Entry (MITM)*. Alphanumeric, 16 positions; required.

Instructions:

1. Complete the Item and Harmonize code fields for each item that you want to update, pressing *Tab* to move from field to field. If you reach the bottom of the screen, select *Next* to advance to another screen.
2. Press *Enter*. The system validates the item codes and highlights any fields you need to correct. Correct any fields and press *Enter* again.
3. Select *Accept* to accept your entries or *Reject* to reject. If you select *Accept*, the confirm accept pop-up window, displayed below, appears.
4. Select *OK* to accept, or select *Exit* to cancel. If you select *OK*, the system updates the harmonize code field for each item you entered. If an item has SKUs, the system updates the harmonize code field for each SKU.

To exit the screen without submitting any updates to harmonize codes, select *Reject*.

Working with Freight Exempt Items (WFEI)

Purpose: Use Work with Freight Exempt Items to exclude items from freight charges.

You may wish to exclude certain items from freight, such as memberships or subscriptions which do not have any freight costs. Also, if the price of an item already includes the cost of freight, you may wish to exclude the item from freight so that you do not charge the customer double the amount of freight.

In this topic:

- *Freight Exempt Items Setup*
- *System Control Values Related to Freight Exemption*
- *Eligible Freight Methods for Freight Exemption*
- *Flagging an Item as Freight Exempt*
- *Include Freight on Pick Slips?*
- *Freight Exempt Items Processing*
- *Use Item Freight Exemption File (E73) Selected?*
- *Eligible Freight Method on Order?*
- *Item on Order Defined in Work with Freight Exempt Items (WFEI)?*
- *Freight Exempt Hierarchy*

- *Freight Exemption and Extra Charges*
- *Work with Freight Exempt Items Screen*
- *Create Freight Exempt Item Screen*
- *Select Ship Via for Exemption Screen*

Freight Exempt Items Setup

Before you can exclude items from freight, you must perform the required setup.

- *System Control Values Related to Freight Exemption*
- *Eligible Freight Methods for Freight Exemption*
- *Flagging an Item as Freight Exempt*
- *Include Freight on Pick Slips?*

System Control Values Related to Freight Exemption

System Control Value	Description
Use Item Freight Exemption File (E73)	*Select* this system control value if you want the system to exclude items from freight based on the *Working with Freight Exempt Items (WFEI)* menu option.
Include Handling in Freight Charge Calculation (D77)	*Select* this system control value if you want to include handling charges in the total dollar amount on an order subject to freight charges. If this system control value is selected and a freight exempt item is defined with a handling charge, the handling charge will not be included in the freight calculation.

Eligible Freight Methods for Freight Exemption

You can exclude items from freight on orders using the following freight methods, as defined in *Working with Source Codes (WSRC)*. See *Introducing Offer and Source Codes* for more information about each freight method.

- Dollar chart by offer ($O) freight; see *Dollar chart by offer ($ Chart by Ofr) freight*
- Dollar chart by source ($S) freight; see *Dollar chart by source ($ Chart by Src) freight*
- Recipient (R) freight; see *Recipient freight*
- Percentage by source (PS) freight; see *Percentage by source (% Source) freight*
- Percentage by ship via (PV) freight; see *Percentage by ship via ($ Ship VIa) freight*
- By Offer Price (OP) freight; see *By Offer Price freight*
- Freight by order weight (OW) freight; see *Freight by order weight (Order Weight) freight*
- Weight (W) freight; see *Weight freight*

Flagging an Item as Freight Exempt

Use the *Working with Freight Exempt Items (WFEI)* menu option to define which items are exempt from freight charges. You can flag an item as freight exempt at the ship via level, offer level, source code level, or item level.

To flag an item as freight exempt across all ship vias, offers, and source codes: At the *Create Freight Exempt Item Screen*, enter the *Item* and leave the *Offer* and *Source* blank. Do not define records at the *Select Ship Via for Exemption Screen*. *Note:* If the item is a SKUed item, all of the SKUs for the item are exempt from freight.

To flag an item as freight exempt at the source code level: At the *Create Freight Exempt Item Screen*, enter the *Item* and *Source*. Leave the *Offer* blank. Do not define records at the *Select Ship Via for Exemption Screen*. The item will be exempt from freight only if the specified source code is defined on the order header. *Note:* The system does not look at the source code defined at the order line level to determine if the item is exempt from freight.

To flag an item as freight exempt at the offer level: At the *Create Freight Exempt Item Screen*, enter the *Item* and *Offer*. Leave the *Source* blank. Do not define records at the *Select Ship Via for Exemption Screen*. The item will be exempt from freight only if the specified offer is associated with the source code on the order header. *Note:* The system does not look at the offer code defined at the order line level to determine if the item is exempt from freight.

To flag an item as freight exempt at the ship via level:

- At the *Create Freight Exempt Item Screen*, enter the *Item* and leave the *Offer* and *Source* blank.
- At the *Select Ship Via for Exemption Screen*, *select* the ship vias for which the item is exempt from freight.

The item will be exempt from freight only if the selected ship via(s) is defined for the item on the order detail line or order header (if a ship via is not defined at the order line level).

Freight exempt items at the ship via level: When the system applies a ship via override to a pick slip, the system does not look at the Freight Exempt Item Ship Via table to determine if one or more of the items on the pick slip is excluded from freight for the ship via override. The system retains the freight that was applied to the order during order entry and prints this freight amount on the pick slip. See *Determining the Shipper for the Pick Slip*.

To flag an item as freight exempt at the ship via level for a specified source code:

- At the *Create Freight Exempt Item Screen*, enter the *Item* and *Source*. Leave the *Offer* blank.
- At the *Select Ship Via for Exemption Screen*, *select* the ship vias for which the item is exempt from freight.

The item will be exempt from freight only if the specified source code is defined on the order header *and* the selected ship via(s) is defined for the item on the order detail line or order header (if a ship via is not defined at the order line level).

To flag an item as freight exempt at the ship via level for a specified offer:

- At the *Create Freight Exempt Item Screen*, enter the *Item* and *Offer*. Leave the *Source* blank.
- At the *Select Ship Via for Exemption Screen*, *select* the ship vias for which the item is exempt from freight.

The item will be exempt from freight only if the specified offer is associated with the source code on the order header *and* the selected ship via(s) is defined for the item on the order detail line or order header (if a ship via is not defined at the order line level).

For more information: See *Freight Exempt Hierarchy* for more information on how the system determines when an item is exempt from freight.

Include Freight on Pick Slips?

There will be no freight charge on a pick slip, even if there are non-freight exempt items on the order, under the following conditions:

- the *Prorate Freight Charges (D39)* system control value is *unselected*
- the *Use Item Freight Exemption File (E73)* system control value is *selected*
- the pick slip includes only freight exempt items
- the order uses one of the *Eligible Freight Methods for Freight Exemption*

Freight Exempt Items Processing

When you add an item to an order in regular order entry/maintenance or receive an order through the *Generic Order Interface (Order API)*, the system uses the following steps to determine if the item is excluded from freight.

For more information see the Web Services Guide on My Oracle Support (ID 2953017.1).

- *Use Item Freight Exemption File (E73) Selected?*
- *Eligible Freight Method on Order?*
- *Item on Order Defined in Work with Freight Exempt Items (WFEI)?*
- *Freight Exempt Hierarchy*
- *Freight Exemption and Extra Charges*
- *Freight Exempt Item Example*

Use Item Freight Exemption File (E73) Selected?

The system checks the setting of the *Use Item Freight Exemption File (E73)* system control value.

- If *unselected*, items defined in the *Working with Freight Exempt Items (WFEI)* menu option are included in the freight calculation.
- If *selected*, items defined in the *Working with Freight Exempt Items (WFEI)* menu option are exempt from freight.

Eligible Freight Method on Order?

The system determines if the freight method on the order is eligible for freight exempt items. You can exclude items from freight on orders using the following freight methods:

- Dollar chart by offer ($O) freight; see *Dollar chart by offer ($ Chart by Ofr) freight*
- Dollar chart by source ($S) freight; see *Dollar chart by source ($ Chart by Src) freight*
- Recipient (R) freight; see *Recipient freight*
- Percentage by source (PS) freight; see *Percentage by source (% Source) freight*
- Percentage by ship via (PV) freight; see *Percentage by ship via ($ Ship VIa) freight*

- By Offer Price (OP) freight; see *By Offer Price freight*
- Freight by order weight (OW) freight; see *Freight by order weight (Order Weight) freight*
- Weight (W) freight; see *Weight freight*

If the order does not use one of these freight methods, the system includes the items on the order in the freight calculation.

If the order uses one of these freight methods, the system excludes the freight exempt items on the order from the freight calculation.

Item on Order Defined in Work with Freight Exempt Items (WFEI)?

The system determines if the item added to the order is defined in the *Working with Freight Exempt Items (WFEI)* menu option.

- If the item is not defined in Work with Freight Exempt Items (WFEI), the system includes the item in the freight calculation.
- If the item is defined in Work with Freight Exempt Items (WFEI), the system determines how the item is exempt from freight. See *Freight Exempt Hierarchy*.

Freight Exempt Hierarchy

If the item qualifies for freight exemption (see *Use Item Freight Exemption File (E73) Selected?*, *Eligible Freight Method on Order?*, and *Item on Order Defined in Work with Freight Exempt Items (WFEI)?*), the system uses the following hierarchy to determine how the item is exempt from freight.

#	Step
1.	**Ship via level:** If records exist for the item on the *Select Ship Via for Exemption Screen*, the item is exempt from freight only for those ship vias selected. The item is excluded from the freight calculation only if the specified ship via is defined on the order. The system uses the ship via defined for the order line; if a ship via is not defined on the order line, the system uses the ship via defined on the order header. In addition: • If an offer is defined for the item on the *Work with Freight Exempt Items Screen*, the item is exempt from freight only for those ship vias selected *and* if the specified offer is associated with the source code on the order header. • If a source code is defined for the item on the *Work with Freight Exempt Items Screen*, the item is exempt from freight only for those ship vias selected *and* if the specified source code is defined on the order header.
2.	**Offer level:** If records do not exist for the item on the *Select Ship Via for Exemption Screen*, but an offer is defined for the item on the *Work with Freight Exempt Items Screen*, the item is exempt from freight only if the specified offer is associated with the source code on the order header. *Note:* The system does not look at the offer code defined at the order line level to determine if the item is exempt from freight.
3.	**Source code level:** If records do not exist for the item on the *Select Ship Via for Exemption Screen*, but a source code is defined for the item on the *Work with Freight Exempt Items Screen*, the item is exempt from freight only if the specified source code is defined on the order header. *Note:* The system does not look at the source code defined at the order line level to determine if the item is exempt from freight.
4.	**Item level:** If records do not exist for the item on the *Select Ship Via for Exemption Screen*, and an offer or source code is not defined for the item on the *Work with Freight Exempt Items Screen*, then the item is always exempt from freight. If the item is a SKUed item, all of the SKUs for the item are exempt from freight.

Freight Exempt Hierarchy Example

The following items are defined in the *Working with Freight Exempt Items (WFEI)* menu option.

Item	Offer	Source	Ship Via	Results
ITM1				When you add ITM1 to an order, the item is always excluded from the freight calculation.
ITM2			1 - UPS 2 - FEDEX	When you add ITM2 to an order, the item is excluded from the freight calculation only if: • the ship via on the order detail line is *1* or *2*, or • if a ship via is not defined on the order detail line, the ship via on the order header is *1* or *2*.
ITM3	7		1- UPS 2 - FEDEX	When you add ITM3 to an order, the item is excluded from the freight calculation only if: • the ship via on the order detail line is *1* or *2* (or, if a ship via is not defined on the order detail line, the ship via on the order header is *1* or *2*), and • the source code on the order header is associated with offer *7*.
ITM4		S7	1 - UPS	When you add ITM4 to an order, the item is excluded from the freight calculation only if: • the ship via on the order detail line is *1* (or, if a ship via is not defined on the order detail line, the ship via on the order header is *1*), and • the source code on the order header is *S7*.
ITM5	7			When you add ITM5 to an order, the item is excluded from the freight calculation only if the source code on the order header is associated with offer *7*.
ITM6		S7		When you add ITM6 to an order, the item is excluded from the freight calculation only if the source code on the order header is *S7*.

Freight Exemption and Extra Charges

Ship via additional charges: Any additional charges associated with a ship via, such as service charges or charges for a federal express service, are still added to an order even when the order contains only freight exempt items.

Extra recipient charges: Extra recipient charges are not added to an order if the recipient has only ordered a freight exempt item.

Handling charges: If the *Include Handling in Freight Charge Calculation (D77)* system control value is selected and a freight exempt item is defined with a handling charge, the handling charge will not be included in the freight calculation.

Freight Exempt Item Example

The following items are defined in *Working with Freight Exempt Items (WFEI)*.

Item	Offer	Source	Ship Via
ITM1		S7	1 - UPS
ITM2		S9	1 - UPS 2 - FEDEX
ITM3		S7	

You create an order with the following information with the ship via code of 1 and a source code of S7 on the order header:

Order Detail Line	Item	Results
Line 1	ITM1 no ship via code defined	Line 1 is exempt from freight because the ship via and source code on the order header match the ship via and source code requirements in Working with Freight Exempt Items for ITM1.
Line 2	ITM2 ship via code 3	Line 2 is not exempt from freight because the ship via on the order detail line and the source code on the order header does not match the ship via and source code requirements in Working with Freight Exempt Items for ITM2.
Line 3	ITM3 ship via code 5	Line 3 is exempt from freight because the source code on the order header matches the source code requirements in Working with Freight Exempt Items for ITM3 and ship via requirements have not been defined in Work with Freight Exempt Items for ITM3.
Line 4	ITM4 no ship via code defined	Line 4 is not exempt from freight because it does not exist in the Working with Freight Exempt Items (WFEI).

Work with Freight Exempt Items Screen

Purpose: Use this screen to work with freight exempt items.

How to display this screen: Enter *WFEI* in the Fast path field at the top of any menu or select Work with Freight Exempt Items from a menu.

Field	Description
Item	An item defined as freight exempt. If the item is a SKUed item, all of the SKUs for the item are exempt from freight. Enter a full or partial item code and select *OK* to display items in alphanumeric order beginning with your entry. Alphanumeric, 12 positions; optional.
Description	The description of the item. Alphanumeric, 35 positions; display-only.

Field	Description
Offer	The offer in which the item is exempt from freight. Enter a valid offer code and select *OK* to display offers that match your entry. Alphanumeric, 3 positions; optional.
Source	The source in which the item is exempt from freight. Enter a valid source code and select *OK* to display source codes that match your entry. Alphanumeric, 9 positions; optional.
Ship via	Defines whether the item is freight exempt at the ship via level. Valid values: • *Y* = The item is exempt from freight at the ship via level. The *Select Ship Via for Exemption Screen* indicates for which ship vias that item is exempt from freight. • *N* = The item is exempt from freight across all ship vias. See *Freight Exempt Hierarchy* for more information on how the system determines when an item is exempt from freight. Alphanumeric, 1 position; display-only.

Screen Option	Procedure
Create a freight exempt item	Select *Create* to advance to the *Create Freight Exempt Item Screen*.
Change a freight exempt item	Select *Change* for a freight exempt item to advance to the Change Freight Exempt Item Screen. See the *Create Freight Exempt Item Screen* for field descriptions.
Delete a freight exempt item	Select *Delete* for a freight exempt item to delete it. Any freight exemptions defined for the item on the *Select Ship Via for Exemption Screen* are also deleted.
Display a freight exempt item	Select *Display* for a freight exempt item to advance to the Display Freight Exempt Item Screen. See the *Create Freight Exempt Item Screen* for field descriptions.
Flag an item as freight exempt at the ship via level	Select *Ship Via* for a freight exempt item to advance to the *Select Ship Via for Exemption Screen*.

Create Freight Exempt Item Screen

Purpose: Use this screen to define an item as exempt from freight.

See *Flagging an Item as Freight Exempt* for instructions on how to flag an item as freight exempt at the ship via, offer, source code, or item level.

How to display this screen: Select *Create* on the *Work with Freight Exempt Items Screen*.

Field	Description
Item	The item you wish to exempt from freight. Items are defined in and validated against the Item table. If the item contains SKUs, each SKU will be exempt from freight. Alphanumeric, 12 positions. Create screen: required. Change screen: display-only.
Offer	The offer in which the item is exempt from freight. There will be no freight for the item if this source code is associated with the source code on the order header. **Note:** The system does not look at the offer code defined at the order line level to determine if the item is exempt from freight. Offer codes are defined in and validated against the Offer table. See *Working with Offers (WOFR)*. Alphanumeric, 3 positions; optional.
Source	The source code in which the item is exempt from freight. There will be no freight for the item if this is the source code on the order header. **Note:** The system does not look at the source code defined at the order line level to determine if the item is exempt from freight. Source codes are defined in and validated against the Source Code table. See *Working with Source Codes (WSRC)*. Alphanumeric, 9 positions; optional.

Instructions:

1. Enter a valid item in the Item field. If the item contains SKUs, each SKU will be exempt from freight.
2. Enter a valid offer in the Offer field if you want to define a specific offer in which the item is exempt from freight, or
3. Enter a valid source code in the Source field if you want to define a specific source code in which the item is exempt from freight, or
4. Leave the Offer and Source fields blank in order to define the item as exempt from freight on all orders. An error message displays if you enter both an offer and source for an item: Only Offer OR Source may be entered, not both.

5. Select *OK*. The system validates your entries and highlights any fields you need to correct. Correct and fields and select *OK* again.
6. A message similar to the following informs you the item freight exemption has been created: `Freight Exempt Item FRT8769 was created`.

Select Ship Via for Exemption Screen

Purpose: Use this screen to flag an item as exempt from freight at the ship via level. If you do not flag any ship vias on this screen, the item is exempt from freight for all ship vias.

See *Freight Exempt Hierarchy* for more information on how the system determines when to exclude an item from the freight calculation.

Which ship vias display? The first time you advance to this screen, or if you have not selected any ship vias on this screen, all ship via codes defined in *Working with Ship Via Codes (WVIA)* display on the screen. If you flag an item as exempt from freight for a particular ship via on this screen, the next time you advance to this screen only those ship vias you have selected display on the screen. You can use the *Toggle All/ Selected* option to switch between displaying all ship vias or only those ship vias that have been selected for freight exemption. The Selected field indicates whether the item is exempt from freight for a particular ship via.

Ship via overrides during pick slip generation: The system reevaluates freight exempt items at the ship via level during pick slip generation if the system applies a ship via override to the pick slip. See *Determining the Shipper for the Pick Slip*.

How to display this screen: Select *Ship Via* for a freight exempt item at the *Work with Freight Exempt Items Screen*.

Ship vias display on this screen in ascending ship via code order.

Field	Description
Item	The code and description of the item that you wish to exempt from freight at the ship via level. This is the item you selected at the *Work with Freight Exempt Items Screen*. Item code: Alphanumeric, 12 positions; display-only. Item description: Alphanumeric, 120 positions; display-only.
Via	A code for a ship via for which you can flag the item as exempt from freight. Ship via codes are defined in and validated against the Ship Via table. Enter a ship via code and select *OK* to display ship via codes in numeric order, beginning with your entry. Numeric, 2 positions; optional.
Description	A description of the ship via. Enter a full or partial description and select *OK* to display ship vias that contain your entry. Alphanumeric, 30 positions; optional.
Priority	The priority assigned to the ship via in the Ship Via table, where *0* is the lowest priority and *9* is the highest priority. Enter a valid priority and select *OK* to display ship vias that match your entry. Numeric, 1 position; optional.

Field	Description
Selected	Indicates whether the item is exempt from freight at the ship via level. • If this field is *NO* for all ship vias on this screen, the item is not exempt from freight at the ship via level. The *Work with Freight Exempt Items Screen* indicates whether the item is exempt from freight for a specific offer, source code, or across all offers and source codes. • If this field is *YES* for one or more ship vias on this screen, the item is exempt from freight only for those ship vias selected. See *Freight Exempt Hierarchy* for more information on how the system determines when the exclude an item from the freight calculation.

Screen Option	Procedure
Flag the item as exempt from freight for a ship via	*Select* a ship via code or select *Select* for a ship via code to update the Selected flag for the ship via to *YES*.
Unflag the item as exempt from freight for a ship via	Select *Deselect* for the ship via code to update the Selected flag for the ship via to *NO*.
Flag the item as exempt from freight for all ship vias	Select *Select All* to update the Selected flag for all ship vias on this screen to *YES*.
Switch between displaying all ship vias on this screen and only those ship vias that have been selected as freight exempt for the item	Select *Toggle All/Selected*. The system switches between displaying all ship vias on this screen and only those ship vias that have been selected as freight exempt for the item.

Working with Item Coordinate Types (WICT)

Purpose: Item coordinate types allow you to group item coordinates by category to help identify which coordinate items are more important to upsell. You can assign a coordinate type to a coordinate item at the *Work with Item Coordinates Screen*.

A sequence number is assigned to each coordinate type, indicating the order (from lowest to highest) in which coordinate items assigned to the coordinate type display on the *Display Coordinate Items Window* in order entry.

In this topic:

- *Item Coordinate Type Example*
- *Updating Coordinate Type Sequence*
- *Work with Item Coordinate Type Screen*
- *Create Item Coordinate Type Screen*

Item Coordinate Type Example

You offer the following coordinates for a hammock:

- hammock stand

- hanging kit
- storage bag
- pillow
- blanket
- canopy

For each of these item coordinates, you assign a type to indicate its importance:

Coordinate	Type	Seq	Results
hammock stand: • metal • wooden hanging kit: • standard • deluxe	M (mandatory)	1	The customer is required to order either a hammock stand or hanging kit. Item coordinates assigned to type M display first on the *Display Coordinate Items Window*.
storage bag	S (strongly recommended)	2	A storage bag is strongly recommended for off-season storage. Item coordinates assigned to type S display after type M item coordinates on the *Display Coordinate Items Window*.
pillow: • cotton filled • down filled	R (recommended)	3	A pillow is recommended, but not required. Item coordinates assigned to type R display after type S item coordinates on the *Display Coordinate Items Window*.
blanket: • fleece • cotton canopy: • green • striped • mosquito netting	O (optional)	4	A blanket or canopy is an optional accessory. Item coordinates assigned to type O display after type R item coordinates on the*Display Coordinate Items Window*.

Updating Coordinate Type Sequence

If you change the sequence number assigned to a coordinate type, the system does not automatically update the sequence number for item coordinates that are assigned to the coordinate type.

For example, if the sequence number for coordinate type *R* is *3*, any item assigned to coordinate type *R* will have a sequence number of *3*. If you change the sequence number for coordinate type *R* from *3* to *5*, any items assigned to coordinate type *R* will still have a sequence number of *3*.

To update the sequence number assigned to item coordinates, select *Submit Update* at the *Work with Item Coordinate Type Screen*.

When you submit the Update Coordinate Type job, the system evaluates each item in the Item Coordinate table. If the item is assigned to a coordinate type, the system updates the sequence number defined for the item coordinate to match the sequence number defined for the coordinate type in the Item Coordinate Type table. Additionally, if the coordinate type has been deleted, the system will update the coordinate type and sequence number defined for the coordinate item to blank.

> **Note:**
>
> You can also update the sequence number assigned to item coordinates by advancing to the *Change Item Coordinate Screen* for each item coordinate you wish to update; however, if you have deleted the coordinate type, you will receive an error message at the Change Item Coordinate screen: `Item Coordinate Type not found`.

Work with Item Coordinate Type Screen

Use this screen to review and work with item coordinate types.

How to display this screen: Enter *WICT* in the Fast path field at the top of a menu or select Work with Item Coordinate Types from a menu.

Field	Description
Type	A code representing a type of item coordinate, such as mandatory or optional. Alphanumeric, 2 positions; optional.
Description	A description of the item coordinate type. Alphanumeric, 30 positions; display-only.
Seq (sequence)	The sequence number assigned to the item coordinate type, indicating the sequence in which coordinate items assigned to this type display on the *Display Coordinate Items Window* in order entry. Numeric, 3 positions; display-only.

Screen Option	Procedure
Create an item coordinate type	Select *Create* to advance to the *Create Item Coordinate Type Screen*.
Change an item coordinate type	Select *Change* for an item coordinate type to advance to the Change Item Coordinate Type Screen. See the *Create Item Coordinate Type Screen* for field descriptions.
Delete an item coordinate type	Select *Delete* for an item coordinate type to delete it.
Update the sequence number assigned to each coordinate item to match the sequence number defined for the coordinate type in the Item Coordinate Type table.	Select *Submit Update*. The system displays the message `Job (UPD_ITMTYP) has been submitted to batch` at the bottom of the screen. See *Updating Coordinate Type Sequence*.

Create Item Coordinate Type Screen

Purpose: Use this screen to create an item coordinate type.

How to display this screen: Select *Create* at the *Work with Item Coordinate Type Screen*.

Field	Description
Coordinate type	A code representing a type of item coordinate, such as mandatory or optional. Alphanumeric, 2 positions. Create: required. Change: display-only.
Description	A description of the item coordinate type. Alphanumeric, 30 positions; required.
Sequence	The sequence number assigned to the item coordinate type, indicating the sequence in which coordinate items assigned to this type display on the *Display Coordinate Items Window* in order entry. Numeric, 3 positions; required.

Setting up SKUs

Purpose: The following topics describe working with SKU elements, groups, split SKUs, and using the SKU generator.

- Introducing SKU Setup discusses SKU concepts and provides an overview of split SKU elements, groups, and the SKU generator.
- Working with SKU Elements (WSK1, WSK2, WSK3) explains how to create, change, delete, and display SKU elements.
- Working with SKU Groups (WISG) includes how to create, change, delete, and display SKU groups.
- Using the SKU Generator (ESKG) describes the SKU Generator and working with input and output screens, including working with SKU base information and creating individual SKUs.
- Resequence the SKU Collating Sequence Number (RSCS) explains how to assign a SKU sort sequence number to each SKU of a selected item.

Working with SKU Elements (WSK1, WSK2, WSK3)

Purpose: The SKU Element function defines the valid values for the three SKU elements (for example, style, color and size). The values defined in this record will be validated throughout the system. For example, if the SKU element is color, you must enter all your valid colors in the SKU Element table.

The SKU Element 1, 2 and 3 tables must be completed if you use SKUs.

When defining SKU elements in the SKU table, the SKU Element 1 field defines the primary SKU element (e.g., style), the Element 2 field defines the secondary SKU element (e.g., color), and the Element 3 field defines the third SKU element (e.g., size).

The Work with SKU Element 1, 2, and 3 screens appear identical.

Uploading: You can use the *Submit Supporting Data Upload Screen (SDUP)* to upload new SKU elements. See *Importing Item-Related Supporting Data (SDUP)* for an overview.

In this topic:

- *Work with SKU Element Screen*
- *Create SKU Element Screen*

Work with SKU Element Screen

Purpose: Use this screen to create, change, delete or display a SKU element.

How to display this screen: Enter:

- *WSK1* in the Fast path field at the top of any menu or select Work with SKU Element 1 from a menu to work with the primary SKU elements
- *WSK2* in the Fast path field at the top of any menu or select Work with SKU Element 2 from a menu to work with the secondary SKU elements
- *WSK3* in the Fast path field at the top of any menu or select Work with SKU Element 3 from a menu to work with the third SKU elements

Field	Description
Element	The code that represents a valid SKU element. Alphanumeric, 4 positions; optional.
Description	The description of the SKU element. Alphanumeric, 10 positions; optional.
Sort sequence # (Sort collating sequence number)	The sequence number used to determine how SKUs sort for an item. See *Create SKU Element Screen* for a complete description. Numeric, 5 positions; display-only.

Screen Option	Procedure
Create SKU element	Select *Create* to advance to the *Create SKU Element Screen*.
Change SKU element	Select *Change* for a SKU element to advance to the Change SKU Element Screen. See the *Create SKU Element Screen* for field descriptions.
Delete SKU element	Select *Delete* for a SKU element to delete it.
Display SKU element	Select *Display* for a SKU element to advance to the Display SKU Element Screen. See the *Create SKU Element Screen* for field descriptions.

Create SKU Element Screen

Purpose: Use this screen to create a SKU element.

How to display this screen: Select *Create* on the *Work with SKU Element Screen*.

Field	Description
Element	The code that represents a valid SKU element. Values defined in this record will be validated throughout the system. For example, if the SKU element is color, enter all your valid colors in this table. Alphanumeric, 4 positions. Create screen: required. Change screen: display-only.
Description	The description associated with the SKU element code. For example, if the SKU element code is BLK, the description might be black. Alphanumeric, 10 positions; required.
Sort sequence # (Sort collating sequence number)	The sequence number used to determine how SKUs sort for an item. The system assigns a SKU sort sequence number in increments of 10 to each SKU of an item based on the sort collating sequence number defined for each SKU element: • in *Resequence the SKU Collating Sequence Number (RSCS)*. • in the SKU Generator (*Using the SKU Generator (ESKG)*) if the *Auto Assign Sort Sequence Number During SKU Generation (F24)* system control value is *selected*. See *Assigning SKU Sort Sequence Numbers Based on SKU Element* for an overview. You can also manually assign a SKU sort sequence number to a SKUI; see *SKU Sort Sequence Numbers* for an overview. Numeric, 5 positions; optional.

Work with SKU Element 2 (WSK2)

See *Working with SKU Elements (WSK1, WSK2, WSK3)*.

Work with SKU Element 3 (WSK3)

See *Working with SKU Elements (WSK1, WSK2, WSK3)*.

Working with SKU Groups (WISG)

Purpose: Use the Work with SKU Groups menu option to set up standard combinations of SKU elements for the types of items you sell. For example, you could set up a group for shoes that includes standard sizes and widths.

Use in SKU generator: You can use SKU groups to reduce data entry when you use the SKU generator. By assigning an item to a SKU group, or specifying a group when you use the SKU generator, you automatically default each element in the group onto the *SKU Generator Screen (Entering SKU Information)*. You can then edit these defaulted elements as needed before generating the SKU combinations.

SKU group structure: You can set up a SKU group to contain one or two SKU elements.

Example: A SKU group for shoes might contain two elements, size and width; or a SKU group for baby clothes might contain one element, standard baby sizes such as 3 months, 6 months, etc.

Additionally, you can designate a SKU group as a primary group, consisting of the primary element only.

Example: If your first SKU element is color, a primary SKU group is restricted to color SKU values.

You cannot set up a SKU group that contains all three SKU elements.

Assigning to an item: If you assign a SKU group to an item through the Work with Item/SKUs menu option (fast path = *MITM*), the SKU group defaults in the SKU Generator and is display-only. See *Performing Initial Item Entry (MITM)*. If you do not assign a default SKU group to an item, you can specify a group at the time you use the SKU Generator.

Exclusions: When setting up a SKU group, you can identify certain combinations that you typically want to exclude when you use the SKU generator. For example, you might not ordinarily carry narrow-width shoes in sizes larger than 10. You can flag these SKU combinations so that the SKU generator does not automatically create them unless you reset the exclusion flag.

In this topic:

- *Work with SKU Groups Screen*
- *Create SKU Group Screen*
- *Change SKU Group Exclusion Screen (Creating or Changing)*

For more information: See *Using the SKU Generator (ESKG)* for more information on how to use SKU groups within the SKU generator.

Work with SKU Groups Screen

How to display this screen: Enter *WISG* in the Fast Path field at the top of any menu, or select Work with SKU Groups from a menu.

Field	Description
Group	A code that represents a group of standard combinations of SKUs for an item. Alphanumeric, 3 positions; optional.
Description	The description of the SKU group. Alphanumeric, 30 positions; optional.

Field	Description
Clr element	Indicates whether this SKU Group contains only the first, or primary, SKU element. Valid values are: *YES* = This SKU group contains the primary SKU element only. *NO* = This SKU group is not limited to the primary SKU element. **Note:** The abbreviation from the *Split SKU Element Column 1 Heading (A34)* system control value is listed above the word "Element."

Screen Option	Procedure
Create a SKU group	Select *Create* to advance to the *Create SKU Group Screen*.
Change a SKU group	Select *Change* for a group to advance to the Change SKU Group Screen. See the *Create SKU Group Screen* for field descriptions. If the SKU group contains two elements, you advance to the *Change SKU Group Exclusion Screen (Creating or Changing)* when you complete this screen.
Delete a SKU group	Select *Delete* for a group to delete it.
Display a SKU group	Select *Display* for a group to advance to the Display SKU Group Screen. See the *Create SKU Group Screen* for field descriptions. Select *OK* to advance to the Display SKU Group Exclusion screen if there are two SKU elements in the SKU group, or select *Exit* to return to the Work with SKU Groups screen.

Create SKU Group Screen

Purpose: Use this screen to define a new SKU group.

How to display this screen: Select *Create* at the *Work with SKU Groups Screen*.

Field	Description
SKU group	A code that represents a group of standard combinations of SKUs for an item. You can use SKU groups to reduce the data entry required for the SKU generator. Numeric, 3 positions. Create screen: required. Change screen: display-only.

Field	Description
Description	The description of the SKU group. Alphanumeric, 30 positions; required.
COLOR	Defines whether this SKU group includes only the primary SKU element (SKU element 1). Valid values are: *selected* = This group contains only the primary SKU element. You must enter *1* in the Element field, below, and can enter values for only the first SKU element. *Example:* If your three SKU elements are color, size, and width, the group can contain only the first SKU element, color. *unselected* = This group is not restricted to the primary SKU element. The group can include SKU values from one or two SKU elements. *Example:* If your three SKU elements are color, size, and width, the group can contain any one or two of these elements. **Note:** The code from the *SKU Element Description 1 (G37)* system control value is listed here as the field name.
Element (First SKU group element)	The first SKU element to include in the SKU group. You must include at least one but not more than two elements. If you set the previous field to *Y*, then you must enter 1 here, and can enter values for only this SKU element. If you set the previous field to *N*, you can enter *1*, *2*, or *3*, to select any of the SKU elements. Numeric, 1 position; required.

Field	Description
SKU values (Unlabeled fields below the first SKU element)	The SKU values to include in the SKU group. You must enter at least one SKU value, and can enter up to 30. Your entries are validated against the SKU Element 1, 2, or 3 table, depending on your entry in the first SKU group element field, above. *Example:* If your SKU elements are color, size, and width, and you entered *2* in the element field, above, you use these fields to enter sizes such as *2*, *4*, *6*, and so on, or *SMLL*, *MEDM*, or *LRGE*. The system validates your entries against the SKU Element 2 table. **Note:** The system does not prevent you from entering the same SKU value more than once. For example, if a valid SKU value is *SMLL*, the system does not prevent you from entering *SMLL* more than once. However, the SKU generator will still work correctly; the system will not attempt to create multiple copies of the same SKU combination. Alphanumeric, 4 positions each; required.
Element (Second SKU group element)	The second SKU element to include in the SKU group. You can enter values for a second SKU element only if this is not a primary SKU group. You can enter *1*, *2*, or *3*, to select any of the SKU elements, excluding the element you specified for the first SKU element, above. *Example:* If your SKU elements are color, size, and width, and you entered sizes for the first SKU group element fields, above, you can enter *1* (color) or *3* (width) here. Numeric, 1 position; optional.

Field	Description
SKU values (Unlabeled fields below the second SKU element)	The SKU values to include in the SKU group. You must enter at least one SKU value if you specified a second SKU element, and can enter up to 30. Your entries are validated against the SKU Element 1, 2, or 3 table, depending on your entry in the second SKU group element field, above. *Example:* If your SKU elements are color, size, and width, and you entered *3* in the element field, above, you use these fields to enter widths such as *A*, *B*, *C*, *D*, and so on. The system validates your entries against the SKU Element 3 table. **Note:** The system does not prevent you from entering the same SKU value more than once. For example, if a valid SKU value is *AA*, the system does not prevent you from entering *AA* more than once. However, the SKU generator will still work correctly; the system will not attempt to create multiple copies of the same SKU combination. Alphanumeric, 4 positions each; required.

Instructions:

1. Complete the necessary fields for the group and the first SKU element. Enter each value to include for the first SKU element. If you designate the SKU group as a primary group, then you must enter *1* in the first SKU group element field, and only values from SKU element one.
2. Optionally, complete the second SKU element and values if this is not a primary SKU group.

When you complete this screen, you advance to the *Change SKU Group Exclusion Screen (Creating or Changing)*, unless the SKU group contains only one SKU element.

Change SKU Group Exclusion Screen (Creating or Changing)

Purpose: Use this screen to identify the SKU combinations to flag for deletion when you use the SKU generator.

Example: You have a SKU group for sportcoats that includes sizes from 38 to 50, and lengths of short, regular, and long. If you do not ordinarily offer long sportcoats in sizes under 40, you use this screen to flag any 38 long SKU combination for deletion. When you use the SKU generator, this SKU combination will have the Delete flag *selected*, although you can override it at that point if you want to create the SKU for an item.

How to display this screen: Complete the *Create SKU Group Screen* or the Change SKU Group Screen; however, you do not advance to this screen if the SKU group contains only one SKU element.

Field	Description
SKU group	A code representing the SKU group you are working with. Numeric, 2 positions; display-only.
Description	The description of the SKU group you are working with. Alphanumeric, 30 positions; display-only.
SIZE/Elem 2	The first SKU element in the SKU group. Depending on how you have set up your SKU elements, the description of this field will vary. Alphanumeric, 4 positions; optional.
WDTH/Elem 3	The second SKU element in the SKU group. Depending on how you have set up your SKU elements, the description of this field will vary. Alphanumeric, 4 positions; optional.
Exclude	Indicates whether the SKU generator should create this SKU combination with the Delete flag *selected*, indicating that the SKU combination will not be created unless you override this setting. Valid values are: *YES* = When you use the SKU generator, the Delete flag for this SKU combination will be *selected*. *No* = When you use the SKU generator, the Delete flag for this SKU combination will be blank.

Completing this screen: To identify SKU combinations that should be created in the SKU generator with the Delete flag *selected*:, *select* each SKU combination you normally exclude in the SKU generator, *Tab* through each excluded combination that you would like to include when generating SKUs.

Using the SKU Generator (ESKG)

Purpose: The SKU generator creates SKUs for an item by allowing you to specify the valid SKU elements (for example, size, color and width) and using them to create an array of valid SKU combinations.

You can use the SKU generator repeatedly for the same item. For example, if you initially create SKUs for an item in one color with various sizes, and later determine that the item is available in a second color, you can create SKUs for the new color and sizes.

SKU groups: You can use SKU groups to facilitate SKU building by reducing data entry. SKU groups allow you to define common sizes, etc. for types of items.

When generating SKUs for an item, you can accept the defaults as defined in a SKU groups, or you can add or subtract individual SKUs.

Create SKU Offers? The *Automatically Create SKU Offers (J71)* system control value indicates whether the SKU generator automatically creates SKU Offers and single-unit SKU Prices based on current or future Item Offers and Item Prices. See that system control value for more information.

In this topic:

- *SKU Generator Prompt Screen (Selecting an Item)*
- *SKU Generator Screen (Entering SKU Information)*

- *Work with SKU Generator Screen*
- *Enter SKU Base Information Pop-Up Window*
- *Create SKU Generator Screen (Creating Individual SKUs)*

SKU Generator Prompt Screen (Selecting an Item)

Purpose: Use this screen to select an item and begin the process of generating SKUs.

How to display this screen: Enter *ESKG* in the Fast path field at the top of any menu or select SKU Generator from a menu.

Entering an item: Enter a valid item code to proceed to the *SKU Generator Screen (Entering SKU Information)*. The item must be SKU'ed (have a *selected* SKU field in the Item table), or an error message indicates: `SKU Generation is not allowed for non-SKU items`.

You cannot use the SKU generator if it is already in use by another person; instead, an error message such as the following indicates: `EJOHNSON already active in the SKU Generator`.

SKU Generator Screen (Entering SKU Information)

Purpose: Use this screen to enter the information to default for the SKU combinations you are creating. The information includes SKU group, vendor item information, and individual SKU elements.

How to display this screen:

- Enter an item code at the *SKU Generator Prompt Screen (Selecting an Item)*.
- Select *SKU Generator* for an item with SKUs at the Work with Item screen.
- You advance to this screen automatically when you create a SKU'ed item if the *Auto Advance to SKU Generator (J06)* system control value is *selected*.

Field	Description
Item	The code and description of the item for which you are generating SKUs. Alphanumeric, 12 positions (item code) 30 positions (description); display-only.
SKU group	If you have assigned the item to a SKU group in the Item table, the group appears here and is display-only; the associated SKU elements appear on the screen. Otherwise, you can enter a valid SKU group to default the related SKU elements. **Note:** Enter the SKU group before entering any SKU values, or the system will clear your SKU value entries when it defaults the values from the SKU group. SKU groups are defined in and validated against the SKU Group table; see *Working with SKU Groups (WISG)*. Numeric, 3 positions; optional or display-only.

Field	Description
SKU default cost	The cost of the SKU. The default cost you entered when you created the item defaults here, but you can override it here or for individual SKUs. Overriding the cost here does not update the default cost for the item. Numeric, 13 positions with a 4-place decimal; optional.
Original retail price	Not currently implemented. Numeric, 13 positions with a 2-place decimal; optional.
List price	The price at which manufacturers recommend retailers sell a product. The system uses this price when you process item to item transfers (inventory transaction code = *G*). The list price of the source and target items must be identical, or the system will not allow you to process the transfer. If you are changing the quantity as part of the transfer, the system will confirm that the list price of the source item is the same as the list price of the target item based on the target item's quantity. For example, if the target item will constitute a set of three of the source item, the list price of the target item should be three times the list price of the source item. Numeric, 13 positions with a 2-place decimal; optional (required if you process item to item transfers).
Create vendor items	Defines whether you want to create vendor items. Valid values are: 1. *Selected* = Create vendor items for each SKU you create. The vendor item code defaults on the Work with SKU Generator Screen as described below under Item. *If the Default SKU generator vendor item system control value is selected*: The system defaults the SKU information to the vendor item code field. Typically, you would default this information if your company's SKU codes are the same as your vendor's SKU codes. Having the system create the vendor item codes can save you data entry. You can override the vendor item codes if necessary. *If the Default SKU generator vendor item system control value is unselected*: You will need to edit the vendor item codes for the SKUs so that they are each unique, or the system displays an error message. 1. *Unselected* = Do not create vendor items. The vendor item information is display-only on the Work with SKU Generator Screen. You should not complete any of the vendor-related fields described below.
Vendor	The code used to identify the vendor. Vendor codes are defined in and validated against the Vendor table. The vendor you assigned to the item, if any, defaults. Enter a vendor code only if you are creating vendor items. See Working with Vendors (WVEN). Numeric, 7 positions; optional (required if you are creating vendor items).
Vendor name	The name of the vendor. Alphanumeric, 30 positions; display-only.

Field	Description
Item	The vendor's item code. The same item code will be used for all the SKUs you create, unless you change the vendor item code on the *Work with SKU Generator Screen*. If the *Default SKU Generator Vendor Item (C61)* system control value is *selected*, and you enter an item here, the system appends the SKU information to your entry in this field to compose the vendor item code. Alphanumeric, 20 positions; optional.
Description	The vendor's description of the item. Alphanumeric, 30 positions; optional (required if creating vendor items).
Price	The vendor's price for the item. When you enter a purchase order, this price defaults. Numeric, 13 positions with a 4-place decimal; optional.
Lead days	The number of days it takes a vendor to deliver this item when you place a purchase order. The system adds the lead days to the current date to determine the due date for an item on a purchase order. Numeric, 3 positions; optional.
U/M (Unit of measure)	A standard by which a vendor's item is sold. Typical units of measure include: • *EA* - each • *IN* - inch • *C12* - case of 12 Unit of measure is defined in and validated against the Unit of Measure table. See *Working with Units of Measure (WUOM)*. Alphanumeric, 3 positions; optional.
Duty (Duty percent)	The percentage of duty or tariff charges applicable to foreign orders. *Update vendor item additional charge:* The system creates an additional charge for each vendor item, using the first purchase order additional charge code whose type is *D* (duty). If there is no duty additional charge code defined in your company, the system creates a blank additional charge for the vendor item. See *Working With PO Additional Charges (WPAC)*, and *Working with Vendor Items (WVNI)*. *Calculate receiving cost*: When you enter or receive purchase orders, the system uses this percentage to calculate the amount of duty that applies to the item. This duty percentage will not be visible when you review the purchase order in purchase order inquiry; however, it will be added to the last purchase cost in the SKU table. See *Purchase Order Receiving Overview*. Numeric, 7 positions with a 2-place decimal; optional.

Field	Description
Color/style/size (SKU elements)	Use these three levels to define the elements to create the various SKU combinations. You can enter up to 30 different elements for each type. If the item is assigned to a SKU group, or if you entered a SKU group at this screen, the SKUs for the group default; however, you can override these defaults. SKU elements are validated against the SKU Element 1, 2, and 3 tables (fast paths = *WSK1*, *WSK2*, *WSK3*). If you enter a SKU element that has not been created, an error message indicates: SKU Element (xxxx) does not exist. See *Working with SKU Elements (WSK1, WSK2, WSK3)*. **Note:** No error message indicates if you enter the same SKU element value more than once; however, the system still creates the SKU combinations normally, without duplicates. Alphanumeric, thirty 4-position fields for each element; required.

Completing this screen: Select *Accept* to accept and begin the SKU generation, or select *Reject* to reject the SKU generator information. If you select *Accept*, you advance to the *Work with SKU Generator Screen*.

Work with SKU Generator Screen

Purpose: Use this screen to review the SKU combinations generated based on your entries at the SKU Generator screen, and to change this information as needed. At this screen, you can:

- delete unnecessary SKUs which were created by the SKU generator
- add SKUs which weren't created
- override information for each SKU or vendor item

How to display this screen: The system creates SKU s (and, optionally, vendor items) and then advances to this screen when you select *Accept* to accept your entries at the *SKU Generator Screen (Entering SKU Information)*.

Field	Description
Item	The code and description of the item. Alphanumeric, 12 positions (item code) 30 positions (description); display-only.
Vendor	The numeric code that identifies the supplier of an item. Numeric, 7 positions; display-only.
Default cost	The default cost of the item from the previous screen. Numeric, 13 positions with a 4-place decimal; display-only.

Field	Description
Create vendor items	Displayed regardless of your entry in the *Create vendor items* field on the previous screen. Valid values are: • *Selected* = Create vendor items. • *Unselected* = Do not create vendor items. The related fields are not enterable. blank = The vendor item-related fields are enterable on the screen. **Note:** The system does not create the vendor items when you accept your entries. Your entry on the previous screen defaults. Enter a new value to change whether the vendor item-related fields are enterable.
Vendor item	The vendor's item code. Your entry at the *SKU Generator Screen (Entering SKU Information)* defaults. *If the Default SKU generator vendor item system control value is selected:* The SKU information appears after the defaulted vendor item code. The SKU information appears by itself if you didn't enter a vendor item at the *SKU Generator Screen (Entering SKU Information)*. *If the Default SKU generator vendor item system control value is unselected:* This field is blank if you are not creating vendor items, or if you did not enter a vendor item code at the *SKU Generator Screen (Entering SKU Information)*. Alphanumeric, 20 positions; optional.
Description	The vendor's description of the item, defaulted from the *SKU Generator Screen (Entering SKU Information)*. You can override this information. Alphanumeric, 30 positions; optional.
Price	The vendor's price for the item, defaulted from the *SKU Generator Screen (Entering SKU Information)*. You can override this information. Numeric, 13 positions with a 4-place decimal; optional.
Lead days	The number of days it takes a vendor to deliver this item when it is ordered through a purchase order. Added to the current date to determine the due date on a purchase order detail line. Defaults from the *SKU Generator Screen (Entering SKU Information)*. You can override this information. Numeric, 3 positions; optional.

Field	Description
Unit of measure	A standard by which a vendor's item is sold. Typical units of measure include: 1. *EA* - each 2. *IN* - inch 3. *C12* - case of 12 Unit of measure is validated against the Unit of Measure table. Defaults from the *SKU Generator Screen (Entering SKU Information)*. You can override this information. Alphanumeric, 3 positions; optional.
Duty (Duty percent)	The percentage of duty or tariff charges applicable to foreign orders. You can override this information. Numeric, 7 positions with a 2-place decimal; optional.
SKU description	The SKU description. Alphanumeric, 40 positions; optional.
SKU	The specific SKU elements. Alphanumeric, three 4-position fields; display-only.
Sort seq. (SKU sort sequence number)	The sequence number used to determine the order in which SKUs sort. You can use the sort sequence to display SKUs in a different order, such as by size, rather than alphanumerically by SKU code. See *SKU Sort Sequence Numbers* for an overview. Required if the *Require Sort Sequence Number in the SKU File (F23)* system control value is *selected*. The system automatically assigns a SKU sort sequence number if the *Auto Assign Sort Sequence Number During SKU Generation (F24)* system control value is *selected*. If this system control value is *selected*, this field does not display. Numeric, 5 positions; required if the Require Sort Sequence Number system control value is *selected*.
Cost	The cost of the SKU, defaulted from the Item table. You can override this value. Numeric, 13 positions with a 4-place decimal; optional.
Delete	Defines whether you wish to delete this SKU. Valid values are: • *Selected* = Delete this SKU. • *Unselected* = Do not delete this SKU; the SKU generator should create it. Defaults to *selected* if you are using a SKU group, and you flagged the SKU combination for exclusion. See *Working with SKU Groups (WISG)*.

Field	Description
L/S class (Long SKU class)	A code you can assign to SKUs for tracking and reporting purposes. The long SKU class you assigned to the base item defaults. If the *Use Retail Integration (H26)* system control value is *selected*, long SKU classes are linked to long SKU departments and are called retail classes. Retail classes are department specific whereas regular long SKU classes are unique and remain constant across departments. For this reason, when the *Use Retail Integration (H26)* system control value is *selected*, you can only enter a retail class in this field that is assigned to the long SKU department of the base item. If you enter a long SKU class that is not linked to the long SKU department, the system will not let you proceed and displays an error message: `L/S Class (xxxx) was not found in L/S Department (xx).` Retail classes are defined in and validated against the Retail Class table; see the *Work with Retail Class Screen* for more information. Long SKU classes are defined in and validated against the Long SKU Class table; see *Working with Long SKU Classes (WLSC)*. **Note:** When the *Use Retail Integration (H26)* system control value is *selected*, you can not access the Work with Long SKU Class menu option or the *WLSC* fast path. Numeric, 5 positions; optional.
L/S vendor (Long SKU vendor)	A code you can assign to SKUs for tracking and reporting purposes. The long SKU vendor you assigned to the item defaults. Long SKU vendor codes are defined in the SKU table but are not validated in Order Administration. Alphanumeric, 7 positions; optional.

Field	Description
L/S style (Long SKU style)	A code you can assign to SKUs for tracking and reporting purposes. Long SKU style is also used by external systems to identify the item. If the *Default SKU Generator L/S Style (J04)* system control value is selected, the SKU generator automatically creates a Long SKU style for each SKU. • If a long SKU style code is defined for the base item, the system creates a long SKU style code for each SKU using the base long SKU style code + SKU code. • If a long SKU style code is not defined for the base item, the system creates a long SKU style code for each SKU using the item code + SKU code. **Note:** The Long SKU style field is 20 positions. If the generated long SKU style code is greater than 20 positions, the system will truncate the value to 20 positions. If the *Default SKU Generator L/S Style (J04)* system control value is unselected and the *Require L/S Style (I94)* system control value is unselected, the system defaults the long sku style code defined for the base item to this field. Required if the *Require L/S Style (I94)* system control value is selected: `L/S Style Required`. Additionally, the system validates that the value you enter is not assigned to another item or SKU: `L/S Style is a duplicate`. Long SKU style codes are defined in the SKU table but are not validated in Order Administration. Numeric, 20 positions; optional.
Original retail price	Not currently implemented. Numeric, 13 positions with a 2-place decimal; optional.
List price	The price at which manufacturers recommend retailers sell a product. The system uses this price when you process item to item transfers (inventory transaction code = *G*). The list price of the source and target items must be identical, or the system will not allow you to process the transfer. If you are changing the quantity as part of the transfer, the system will confirm that the list price of the source item is the same as the list price of the target item based on the target item's quantity. For example, if the target item will constitute a set of three of the source item, the list price of the target item should be three times the list price of the source item. Numeric, 13 positions with a 2-place decimal; optional (required if you process item to item transfers).

Instructions: To accept the SKU information:

1. Edit or add information to the necessary fields.
2. To create additional SKUs, select *Create* and enter the SKU details at the *Create SKU Generator Screen (Creating Individual SKUs)*.
3. Select *Accept* to accept. The system displays an error message if any of the SKU combinations are duplicates of existing SKUs. Flag each duplicate for deletion by *selecting* the Delete field, or correct as desired.
4. Select *Accept* again. You advance to the *Enter SKU Base Information Pop-Up Window*.

Enter SKU Base Information Pop-Up Window

Purpose: Use this window to define the information applicable to all the SKUs you are creating. The system copies this information to each SKU. You can override this information on the Change SKU screen.

How to display this screen: Select *Accept* at the *Work with SKU Generator Screen*.

Field	Description
Item	The code and description of the base item for which you are creating SKUs. Alphanumeric, 12 positions (item code) 30 positions (description); display-only.
U/M (Unit of measure)	A standard by which a vendor's item is sold. Typical units of measure include: • *EA* - each • *IN* - inch • *C12* - case of 12 If you leave this field blank, the unit of measure defined for the base item defaults for the SKUs. Unit of measure is validated against the Unit of Measure table. See *Working with Units of Measure (WUOM)*. Alphanumeric, 3 positions; optional.
Itm category (Item category)	A code assigned to the item to classify and group like items for use in the Item Relationships function. The Compatibility field should also be completed to fully use the Item Relationships function. See Working with Item Category Codes (WITG). Numeric, 4 positions; optional.
Compatibility	A code assigned to an item or SKU which you can use in the Item Relationships function to display a list of other compatible items. *Example:* Item PC1 represents an IBM PC. You can assign a compatibility code of 01 (IBM Products) to this item and to other IBM items such as printers, network cards, etc. Numeric, 3 positions; optional.
Prep code	A code used to indicate any special preparation or handling required for the SKU. Informational only. Alphanumeric, 2 positions; optional.
Return/vendor	Indicates whether the SKU can be returned; informational only. Valid values are: • *Selected* = This SKU is returnable. • *Unselected* = This SKU is not returnable.

Field	Description
Country of origin	A code representing the country where the SKU originated. Used by the World Pack interface to determine duty for shipments to certain countries. Country codes are defined in and validated against the Country table; see *Setting Up the Country Table (WCTY)*. Alphanumeric, 3 positions; optional.
S/O control (Soldout control)	This code, from the Soldout Control table, indicates when the item is considered sold out. An item can be sold out: • immediately • when the available quantity equals zero • when the available quantity plus any quantity due on purchase orders equals zero. If you have specified a *Default Soldout Control Code (D72)* it defaults here, but you can override it. If the *Disregard Soldout Controls for Non-Allocatable Warehouses (J27)* system control value is *selected*, the system disregards soldout control rules for items reserved against a non-allocatable warehouse. If the item cannot be reserved, the system backorders the item in the non-allocatable warehouse. See this system control value for more information. See *Working with Soldout Controls (WSLD)* for more information on working with soldout controls. Alphanumeric, 2 positions; optional.
Sup B/O card (Suppress backorder card)	Indicates whether to produce a backorder card for the SKUs. You might use this field to identify promotional items, free gifts, or catalogs, to prevent them from generating backorder cards or appearing on backorder lists. Valid values are: • *Selected* = Suppress normal backorder card generation for this item. • *Unselected* = Do not suppress normal backorder card generation. If the *Unconditional Suppression of Backorder Card (F19)* system control value is *selected*, suppressed SKUs will never appear on a backorder card. If this system control value is *unselected*, suppressed SKUs will appear only on the first backorder card for the order, and only if an unsuppressed item triggers the backorder card generation.
Zone reservation	A code assigned to weather-sensitive items or SKUs such as plant stock to insure that the SKUs will ship to different regions of the country within date windows suited to the regions. Zone reservation coded items/SKUs will not be reserved during order entry; instead they will be assigned a backorder status of *Z* (Zoned reservation), and will be reserved during pick generation using the batch reservation function, at an optimal time for shipping.

Field	Description
	Zone reservation logic requires: • The item/SKU must be assigned a zone reservation code. For SKU'ed items, the zone reservation code must be assigned at the SKU level. • The offer associated with the order must be assigned a season code • The shipping address for the order must be assigned to a geographic zone, using either the postal ZIP code of the ship to address, or the SCF (Sectional Center Facility) code of the ship to address. The SCF code consists of the first three digits of the ZIP code. • For each zone reservation code, you must define zone date windows for all geographic zones in the country See *Creating and Maintaining Geographic Zones (WGZN)*. Alphanumeric, 4 positions; optional.
Warehouse	A code that represents the warehouse where you will keep the SKU. The default warehouse from the System Control table defaults. Warehouse codes are validated against the Warehouse table. See *Creating and Maintaining Warehouses (WWHS)*. Numeric, 3 positions; required.
Whs max (Warehouse maximum)	The recommended maximum quantity of the SKU to keep in the warehouse. Numeric, 7 positions; optional.
Whs min (Warehouse minimum)	The recommended minimum quantity of the SKU to keep in the warehouse. Numeric, 7 positions; optional.
Allocation freeze	Indicates whether reservations can be performed against the SKU in the specified warehouse. • *Selected* = The SKU is on hold for item reservation. All other inventory transactions are allowed. • *Unselected* = The SKU is not on hold for item reservation.
Protected Quantity	An amount of inventory that is not reserved automatically for this SKU. You can reserve the protected quantity through *Working with Interactive Reservation (MIRV)* only, as in the case of large wholesale orders or preferred mail order customers. Protected quantity is included in on-hand quantity. Numeric, 7 positions; optional.
Reorder qty (Reorder quantity)	The quantity of this SKU that should be ordered when the on-hand quantity reaches the minimum from the Min Qty field. Numeric, 7 positions; optional.
Location	The default location in the warehouse where the item is kept. This location is sometimes referred to as the “primary primary.”The “primary primary” location is stored in the field in the SKU table. Alphanumeric, 7 positions; optional.
Loc max (Location maximum)	The maximum quantity of the item to keep in this location. Numeric, 7 positions; optional.
Loc min (Location maximum)	The minimum quantity of the item to keep in this location. Numeric, 7 positions; optional.

Field	Description
Freeze flag	Indicates whether to generate pick slips for this item location. Valid values are: • *Selected* = This item location is available for pick slips. • *Unselected* = This item location is not available for pick slips.
Restrict	Indicates whether you can accept an order for this item/SKU in and whether demand is captured. • *Selected* = The operator cannot accept an order for this item/ SKU. • *Unselected* = The operator can accept an order for this item/SKU.

Create SKU Generator Screen (Creating Individual SKUs)

Purpose: Use this screen to add a SKU that was not generated based on the information from the SKU Generator screen. For example, if your SKU generator for Shoes does not generate a SKU for Size 11 shoes, you may want to add the SKUs Black, 11, B width, and Black, 11, A width to the SKUs for this item.

How to display this screen: Select *Create* on the *Work with SKU Generator Screen*.

Field descriptions: See *SKU Generator Screen (Entering SKU Information)* for field definitions.

Resequence the SKU Collating Sequence Number (RSCS)

Purpose: Use the *Resequence SKU Collating Sequence Number Screen* to assign a SKU sort sequence number to each SKU of an item.

In this topic:

- *SKU Sort Sequence Numbers*
- *Where is the Sort Sequence Number Used?*
- *How is a Sort Sequence Number Assigned?*
- *Related System Control Values*
- *Assigning SKU Sort Sequence Numbers Based on SKU Element*
- *Resequence SKU Collating Sequence Number Screen*

SKU Sort Sequence Numbers

SKU Sort Sequence Numbers are sequence numbers assigned to SKUs to determine the order in which the SKUs sort. You can use the sort sequence to display SKUs in a different order, such as by size, rather than alphanumerically by SKU code.

Example: T-Shirts in sizes extra small, small, medium, large and extra large that are not assigned a SKU sort sequence number sort alphanumerically by SKU code:

- t-shirt LRGE
- t-shirt MEDM
- t-shirt SMLL
- t-shirt XLRG

- t-shirt XSML

You can define a SKU sort sequence number for each SKU of the t-shirt so that they sort from smallest to largest size:

- t-shirt XSML (sequence # 1)
- t-shirt SMLL (sequence # 2)
- t-shirt MEDM (sequence # 3)
- t-shirt LRGE (sequence # 4)
- t-shirt XLRG (sequence # 5)

> **Note:**
>
> If some SKUs of an item are not assigned a sort sequence number, the system sorts those SKUs first alphanumerically by SKU code, and then displays SKUs assigned to a sort sequence alphanumerically by sort sequence. For example, if sizes SMLL, MEDM, and LRGE are assigned a sort sequence number, but sizes XSML and XLRG are not assigned a sort sequence number, the system displays sizes XLRG and XSML first: XLRG, XSML, SMLL, MEDM, LRG.

Where is the Sort Sequence Number Used?

The sequence number is used to sort items:

1. when scanning for a SKU during purchase order maintenance
2. when scanning for a SKU during order entry and maintenance

How is a Sort Sequence Number Assigned?

You can assign a SKU sort sequence number to each SKU of an item in the following ways.

1. Enter a SKU sort sequence number in the Sort sequence number field on the *Create SKU 1 of 2 (With Overrides) Screen* or the Change SKU screen.
2. Select an item that contains SKUs at the *Resequence SKU Collating Sequence Number Screen* and select *OK* to have the system automatically assign a sort sequence number to each SKU, based on the SKU collating sequence number defined for each SKU element. See *Assigning SKU Sort Sequence Numbers Based on SKU Element*.
3. Enter a SKU sort sequence number in the Sort sequence number field on the *Work with SKU Generator Screen* in *Using the SKU Generator (ESKG)*.
4. *Select* the *Auto Assign Sort Sequence Number During SKU Generation (F24)* system control value to have the system automatically assign a SKU sort sequence number to each SKU in the SKU Generator (fast path = *ESKG*).

Related System Control Values

System Control Value	Description
Auto Assign Sort Sequence Number During SKU Generation (F24)	Defines whether the system automatically assigns a SKU sort sequence number to each SKU created in the SKU Generator.

System Control Value	Description
Require Sort Sequence Number in the SKU File (F23)	Defines whether the Sort sequence number field on the Create SKU and Change SKU screens in Work with Item/SKUs is a required field.

Assigning SKU Sort Sequence Numbers Based on SKU Element

The system uses the sort collating sequence number defined in *Working with SKU Elements (WSK1, WSK2, WSK3)* to determine the SKU sort sequence number to assign to each SKU. The system assigns a sort sequence number to each SKU in increments of 10.

Example:

For example, you are generating SKUs for a skirt in colors black and navy, styles petite and regular and sizes small and medium.

In Work with SKU Elements, the sort sequence numbers are defined as follows:

- *SKU Element 1*
- black: sort sequence number is blank
- navy: sort sequence number is blank
- *SKU Element 2*
- petite: sort sequence number is 1
- regular: sort sequence number is 12
- *SKU Element 3*
- small: sort sequence number is 2
- medium: sort sequence number is 5

To assign the sort sequence number, the system first retrieves the sort sequence number defined in Work with SKU Element 1. In this example, the colors black and navy are not assigned a sort sequence number. Since they are not assigned a sort number, the system sorts the elements defined in SKU Element 1 alphanumerically.

The system then retrieves the sort sequence number defined in Work with SKU Element 2. In the example, petite is assigned a sort sequence number of 1 and regular is assigned a sort sequence number of 12. The system sorts petite styles before regular styles.

The system then retrieves the sort sequence number defined in Work with SKU Element 3. In the example, small is assigned a sort sequence number of 2 and medium is assigned a sort sequence number of 5. The system sorts small sizes before medium sizes.

The system assigns SKU sort sequence numbers to each SKU based on the sort collating sequence numbers defined for each SKU element:

Item/ SKU	Element 1/ Sequence #	Element 2/ Sequence #	Element 3/ Sequence #	SKU Sort Sequence Number
skirt	black (blank)	petite (1)	small (2)	10
skirt	black (blank)	petite (1)	medium (5)	20
skirt	black (blank)	regular (12)	small (2)	30
skirt	black (blank)	regular (12)	medium (5)	40
skirt	navy (blank)	petite (1)	small (2)	50
skirt	navy (blank)	petite (1)	medium (5)	60
skirt	navy (blank)	regular (12)	small (2)	70
skirt	navy (blank)	regular (12)	medium (5)	80

Resequence SKU Collating Sequence Number Screen

Use this screen to select an item you wish to assign SKU sort sequence numbers to for each of the item's SKUs.

The following error message indicates if the *Auto Assign Sort Sequence Number During SKU Generation (F24)* system control value is *unselected*: `Auto Assign Sort Seq# is not selected`.

How to display this screen: Enter *RSCS* in the Fast path field at the top of any menu or select Resequence SKU Collating Sequence Number from a menu.

Field	Description
Item number	The item you wish to assign SKU sort sequence numbers to for each of the item's SKUs. The following error message indicates if you enter an item that does not contain SKUs: `Item entered is a Non-SKU'd Item`. Alphanumeric, 12 positions; required.

Working with Sets

In this part: The following topics describe how to create, change, delete, and display sets.

- Introducing Sets provides a brief overview of sets and how to select the set tables.
- Entering Set Information (WSET) describes a set; how to scan for, create, and delete sets; and how to work with set component items.
- Entering Variable Set Information (WVST) defines a variable set and includes how to scan for, create, and delete variable sets, and how to work with variable set groups.
- Entering Finished Goods Information (WFGD) defines a finished good and includes how to scan for, create, and delete finished goods sets, and how to work with finished good component items.

Entering Set Information (WSET)

Purpose: Use the Work with Sets function to indicate which component items make up a set. A set is a group of two or more items that you sell together as a unit, usually at a reduced price. The items that make up a set are often referred to as components. You can also offer these components individually.

The system identifies a set item by the setting of *S* in the *Kit type* field. When the Order Entry operator enters the set item, a line is added to the order for each component of the set. The set item itself is a non-inventory item. All inventory is kept at the component level.

The system tracks Unit Demand (Units Order) at both the component item level and set level, and Dollar Demand at the set level only. For example, a set is made up of 3 combs and 2 brushes. Someone orders the comb/brush set for $15.00. Units ordered for the comb/brush set increases by 1, units ordered for brushes increase by 2, and units ordered for combs increase by 3. Dollars ordered for the set item only increases by $15.00. Dollars orders for the component items increase only when you sell them as separate items.

Making sure the set ships together: You must make sure to coordinate group the components of the set; otherwise, it is possible for the main set item to print and bill even if there is not a sufficient quantity of the component items. Also, a set may split into several picks based on the warehouse, ship via, or location class assigned to the main set item and its components; see *Splitting an Order Across Multiple Picks* for a complete list of when the items on an order may split into several picks. *Example:* If the component items are assigned to location class B and the main set item is not, the main set item prints on a separate pick slip from the components.

Print set separately? If the main set item or its component items are flagged as ship alone items, a separate pick slip prints for each item included in the set with the message **Other Items Shipped Separately**. However, the system will include the main set item with one of the component items that is assigned to the same ship via in order to avoid printing the main set item on its own pick slip. If the main set item or its component items are not flagged to ship alone, the main set item and components are eligible to print on the same pick slip as the other items.

If set is on hold: If the main set item is on hold, the system does not perform pick slip preparation or produce a pick slip for the set and its components, regardless of whether the components of the set are coordinate grouped, until the main set item is released from hold. If another item on the order prints on a pick slip, the set and its components are listed as backordered on the pick slip.

If a component of the set is on hold:

- The system does not perform pick slip preparation or produce a pick slip for the set and its components if the components of the set are coordinate grouped. If another item on the order prints on a pick slip, the set and its components are listed as backordered on the pick slip.
- If the components of the set are not coordinate grouped, the system performs pick slip preparation and generates a pick slip for the main set item and the components that are not on hold. The component that is on hold is listed as backordered on the pick slip.

Secured feature: The *Set Component Maintenance (J01)* secured feature controls the ability to change, cancel, delete, or sell out a set component item in order entry and order maintenance. See that secured feature for more information.

Soldouts:

- *Component items(s):*

- If the *Sell Out Set if Component is Sold Out (I05)* system control value is *selected*: When any of the component items on a set are sold out based on the assigned soldout control code and the current inventory situation, the main set item and each of the component items are added to the order in a soldout status (*S*). For example, if the set includes five items, and one of the items is assigned a soldout control code indicating to sell the item out immediately, the main set item and all of the component items will be added to the order in a soldout status.
- If this system control value is *unselected*: In the example described above, just the sold out component item is added to the order in a soldout status.
- *Main set item:* If the main set item itself is assigned any soldout control code, the main set item and each of the component items are added to the order in a soldout status (*S*).

See *Working with Soldout Controls (WSLD)* for a discussion on how soldout controls indicate when an item is sold out.

> **Note:**
>
> When one or more of the set's components are backordered (that is, they are unavailable, but no soldout control code has been assigned to them) the system will not perform pick slip preparation or generate a pick slip for the set item if the components are coordinate grouped.

Set component upload: You can use the set component upload option to create the set header and set components. See *Importing Set Components (WCUP)* for information.

Cannot add accompanying item with set: The system does not add an accompanying item to the order if it is associated with a set item.

In this topic:

- *Work with Sets Screen*
- *Create Set Screen*
- *Work with Set Component Items Screen*

Work with Sets Screen

How to display this screen: Enter *WSET* in the Fast Path field at the top of any menu or select Work with Sets from a menu.

Field	Description
Item	The set item code. Alphanumeric, 12 positions; optional.
Clr Size Wdth	The SKU elements. Scanning on these fields is not currently implemented. Alphanumeric, three 4-position fields; optional.
Description	The description of the set item. Alphanumeric, 30 positions; optional

Screen Option	Procedure
Create a set	Select *Create* to advance to the *Create Set Screen*.
Delete a set	Select *Delete* for a set item to delete it. Deleting a set does not delete the set item or components, just the association (link) between the two.
Work with set component items	Select *Work with* for a set item to advance to the *Work with Set Component Items Screen*.

Create Set Screen

Purpose: Use this screen to create a set item.

How to display this screen: At the *Work with Sets Screen*, select *Create*.

Field	Description
Set item	A set item/SKU. The set item/SKU is made up of two separate fields. The first part is the item code, which represents a unit of inventory. The second part is the SKU code, which represents the special characteristics of an item, such as color, size, width, etc. The item code you enter must have an *S* in the *Kit type* field. Alphanumeric, 12 positions (item), three 4-position fields (SKU); required.

Completing this screen: Enter the item number to advance to the *Work with Set Component Items Screen*.

Work with Set Component Items Screen

Purpose: Use this screen to add, change, delete, or display component items that make up a set (as defined by an *S* in the Kit Type field in the Item table).

How to display this screen:

- Enter an item at the *Create Set Screen*.
- Select *Work with* for a set item at the *Work with Sets Screen*.
- Select *Sets* for a set item at the *Work with Items Screen* or *Work with SKUs Screen*.
- Select *Display Components* for a set item at the *Display Item/Warehouse Information Screen*

Field	Description
Item	A component item of the set. Item codes are defined in and validated against the Item table. You can define finished goods as component items; however, you cannot define other sets or variable sets as components. Alphanumeric, 12 positions; required.

Field	Description
SKU	The SKU elements that define the item. **Note:** If the item has SKUs, you must specify the specific SKU elements here. You do not have an opportunity in Order Entry to specify a component item's SKU. Alphanumeric, three 4-position fields; required if item has SKUs.
Qty	The number of units of this item to include in one set. Numeric, 5 positions; required.
Cost % (Cost percentage)	The percentage of the set's cost that this item comprises. The total cost of all components must equal 100%. Numeric, 5 positions with a 2-place decimal; optional.
CG (Coordinate group)	A number that you can assign to components in a set to ensure that they will ship together. You should assign the same coordinate group number to all components of a set to ensure that they ship together. This coordinate group number will display in the order detail line in Order Entry. **Note:** You must make sure to coordinate group the components of the set; otherwise, it is possible for the main set item to print and bill even if there is not a sufficient quantity of the component items. Numeric, 3 positions; optional.
Avail	The total quantity available for the component item. **Note:** If you advanced to this screen from the *Display Item/Warehouse Information Screen*, the available quantity reflects the selected warehouse only; otherwise, the quantity reflects all allocatable warehouses. Numeric, 7 positions; display-only.

To add components:

1. Complete each required field for a component item and, optionally, the Coordinate group field.
2. Select *OK* to add the new component item information and display it in the middle area of the screen.
3. Continue with the above steps until you have defined all components of the set.
4. Select *Accept* to accept the components. The system validates that the total cost percentage for all component items equals 100%. Correct any item's cost percentage, if necessary, by selecting *Change* for it to advance to the Change Set Component Item screen. Select *Accept* again when you are done.

Screen Option	Procedure
Accept a set	Select *Accept* to accept the set information.
Change a component item	Select *Change* for a component item to advance to the Change Set Component Item Screen. See above for field descriptions.
Delete a component item	Select *Delete* for an item to delete it as a component of the set.
Display a component item	Select *Display* for an item to advance to the Display Set Component Item Screen. See above for field descriptions.

Entering Variable Set Information (WVST)

Overview: A variable set consists of a list of items that customers can choose from to make up the set they want to purchase. Individual items may also be selected from this screen. Typically, the items available in a variable set all exist on the same page of the catalog.

A variable set item is designated by a *V* in the *Kit type* field in the Item table. A variable set, for example a Wardrobe Set, may be a special collection of items such as: “Choose any 2 slacks, 1 jacket, and 1 belt from this page for only $200.00.” Variable set groups, in this case, must be defined for slacks, jackets, and belts, providing the customer with several combinations of colors and sizes.

In Order Entry, when the operator enters a variable set item, a pop-up window appears for each “group” of items in the variable set. Each pop-up window contains a list of valid items in the group. The operator must select the desired items from each group. The system will ensure that the customer orders the correct quantity from each variable set group by maintaining a counter of the number of items allowed as compared to the number of items selected. The variable set item does not appear on the order. Instead, the system creates order entry detail lines for each item picked from groups.

Unit Demand (units ordered) is tracked at the component item level only. For example: the variable set is made up of 2 pair of slacks, 1 jacket, and 1 belt. A customer orders the slacks, jacket, and belt as a variable set. Units ordered for the slacks increases by 2, units ordered for the jacket increases by 1, and units ordered for the belt increases by 1. Dollars ordered is tracked at the component item level only.

> **Note:**
>
> Variable sets are priced by item components; the price of the complete set is the total price of each of its components. Although you can enter a price for a variable set item at the item offer, the system does not use this price when totaling the price of the order.

Set component upload: You can use the set component upload option to create variable set groups and group components. See *Importing Set Components (WCUP)* for information.

In this topic:

- *Work with Variable Sets Screen*
- *Create Variable Set Screen*
- *Create Variable Set Group Screen*
- *Work with Variable Set Components Screen*
- *Work with a Variable Set Groups Screen*

Work with Variable Sets Screen

How to display this screen: Enter *WVST* in the Fast Path field at the top of any menu or select this option from a menu.

Field	Description
Item	The variable set item number. Alphanumeric, 12 positions; optional.
Clr Size Wdth	The SKU elements. SKU elements can be entered in conjunction with the item number to further narrow the scan. The system cannot display scan information without the item number. You must enter the item number in conjunction with one or more SKU elements. Alphanumeric, three 4-position fields; optional.
Description	The description of the item. Alphanumeric, 120 positions; display only.

Screen Option	Procedure
Create a variable set	Select *Create* to advance to the *Create Variable Set Screen*.
Delete a variable set	Select *Delete* for a set to delete it.

> **Note:**
>
> Deleting a variable set does not delete the set item or components, just the association (link) between the two.

Screen Option	Procedure
Work with a variable set group	Select *Work with* for a set to advance to the *Work with a Variable Set Groups Screen*.

Create Variable Set Screen

To create a variable set: At the *Work with Variable Sets Screen*, select *Create*.

Field	Description
Variable set	The variable set item/SKU is made up of two separate fields. The first part is the item code which represents a unit of inventory. The second part is the SKU code which represents the special characteristics of an item, such as color, size, width, etc. The item code you enter must have the Kit Type field set to *V*. Alphanumeric, 12 positions (item), three 4-position fields (SKU); required.

Instructions: Enter the item code to advance to the *Create Variable Set Group Screen*.

Create Variable Set Group Screen

To create a variable set group: Complete the *Create Variable Set Screen*. You can also display this screen by selecting *Create* at the *Work with a Variable Set Groups Screen*.

Field	Description
Group	The numeric code that represents the group. The pop-up window in Order Entry will appear in group code sequence; therefore, if you want to be prompted for jackets before belts, you should create jackets with a lower group code number than belts. Numeric, 3 positions; required.
Description	The description of your group. The description appears in the pop-up window in Order Entry. Alphanumeric, 30 positions; required.
# of items	The number of units the customer must order from this group. **Note:** Multiple units of the same item may be ordered to achieve this number. Numeric, 3 positions; required.

Completing this screen: When you complete this screen, you advance to the Work with Variable Set Components Screen.

Work with Variable Set Components Screen

Purpose: Use this screen to define each item available in a variable set group. You can define several variable set groups for one variable set item.

How to display this screen:

- Select *Work with* for an item *Work with a Variable Set Groups Screen*.
- Complete the *Create Variable Set Group Screen*.
- Select *Variable Sets* for a variable set item at the *Work with Items Screen* or *Work with SKUs Screen*.
- Select *Display Components* for a variable set item at the *Display Item/Warehouse Information Screen*

Field	Descriptions
Variable set	The variable set item/SKU is made up of two separate fields. The first part is the item code which represents a unit of inventory. The second part is the SKU code which represents the special characteristics of an item, such as color, size, width, etc. Alphanumeric, 12 positions (item), three 4-position fields (SKU); display-only.
Group	The numeric code that represents the group. Numeric, 3 positions; display-only.
# of items	The number of units the customer must order from this group. **Note:** Multiple units of the same item may be ordered to achieve this number. Numeric, 3 positions; display-only.
Item	The item to be included as part of the variable group. Validated against the Item table. A customer can order any combination of the component items to make up the number of items in the group. Alphanumeric, 12 positions; required.
SKU	The SKU elements used to further define the item. **Note:** If the item has SKUs, the specific SKU elements must be specified. The SKU scan screen will not display in Order Entry. Alphanumeric, three 4-position fields (SKU); required (if the item has SKUs).

Field	Descriptions
Description	Description of the item. Alphanumeric, 120 positions; display-only.
Avail	The total quantity available for the component item. **Note:** If you advanced to this screen from the *Display Item/Warehouse Information Screen*, the available quantity reflects the selected warehouse only; otherwise, the quantity reflects all allocatable warehouses. Numeric, 7 positions; display-only.

Adding component items to a variable set: Enter each item code and the SKU information, if the item has SKUs. Each time you enter an item, the system validates the information and displays the item below the entry fields.

Work with a Variable Set Groups Screen

Purpose: Use this screen to change, delete, display, or create variable set groups for the variable set which are similar to option packages that specify the item quantity required from each group to make up the variable set.

This function allows you to define the variable set group codes and descriptions and provides access to the *Work with Variable Set Components Screen*, which allows you to identify each item available in the variable set group.

How to display this screen:

1. Complete the *Create Variable Set Screen*.
2. Select *Work with* for an item at the *Work with Variable Sets Screen*.
3. Select *Variable Sets* for an item at the *Work with Items Screen* or *Work with SKUs Screen*.

Field	Description
Group	The numeric code that represents your group. Numeric, 3 positions; optional
Description	The description of your group. Alphanumeric, 40 positions; optional.
# of items	The number of different items that make up your group. Numeric, 3 positions; optional.

Screen Option	Procedure
Create a variable set group	Select *Create* to advance to the *Create Variable Set Group Screen*.
Change a variable set	Select *Change* for a variable set group to advance to the Change Variable Set Group Screen. See the *Create Variable Set Group Screen* for field descriptions.
Delete a variable set	Select *Delete* for a variable set group to delete it.
Work with variable set components	Select *Work with* for a variable set group to advance to the *Work with Variable Set Components Screen*.

Entering Finished Goods Information (WFGD)

Overview: A finished good is an item that requires assembly prior to picking and packing and is comprised of one or more component items that may also be sold individually, or of raw materials that are used only as components of a finished good. An item record must exist for each component item, including raw materials (so that you can track inventory and usage).

When an Order Entry operator places an order for a finished good, the components of the finished good do not appear on the Order Entry screen, only the finished good item.

Unit demand (units ordered) is tracked at the finished goods level. Dollar demand is tracked at the finished goods level. For example: the finished good is a sketch kit and its component items are 1 drawing pad, 3 charcoal pencils and 1 erasure. A customer orders the sketch kit for $20.00. Units ordered for the finished good increase by 1, and dollars ordered increase for the finished good by $20.00.

In this topic:

- *Work with Finished Goods Screen*
- *Create Finished Good Screen*
- *Work with Finished Good Component Items Screen*

Work with Finished Goods Screen

How to display this screen: Enter *WFGD* in the Fast path field at the top of any menu or select Work with Finished Goods from a menu.

Field	Description
Item	The finished good item number. Alphanumeric, 12 positions; optional.
Clr Size Width	The SKU elements. Alphanumeric, three 4-position fields; optional.
Description	The description of the item. Alphanumeric, 120 positions; optional.

Screen Option	Procedure
Create a finished good	Select *Create* to advance to the *Create Finished Good Screen*.
Delete a finished good	Select *Delete* for a finished good to delete it. **Note:** Deleting a finished good does not delete the item or component items, just the association (link) between the two.
Work with finished good components	Select *Work with* for a finished good to advance to the *Work with Finished Good Component Items Screen*.

Create Finished Good Screen

Purpose: Use this screen to create a finished good.

How to display this screen: At the *Work with Finished Goods Screen*, select *Create*.

Field	Description
Finished good	The finished good item/SKU. Item: alphanumeric, 12 positions; required. SKU: three 4-position fields; required if the item has SKUs.

Work with Finished Good Component Items Screen

Purpose: Use this screen to add, change, delete, or display component items associated with a finished good (as defined by an *F* in the *Kit type* field for the item).

How to display this screen:

- Complete the *Create Finished Good Screen*.
- Select *Work with* for a finished good item at the *Work with Finished Goods Screen*.
- Select *Finished Goods* for a finished good item at the *Work with Items Screen* or *Work with SKUs Screen*.
- Select *Display Components* for a finished good item at the *Display Item/ Warehouse Information Screen*

Field	Description
Item	A component item that makes up the finished good. Alphanumeric, 12 positions. Work with screen: required. Change screen: display-only.
SKU	The SKU elements used to further define the item. Alphanumeric, three 4-position fields; required if the item has SKUs.
Qty	The number of items that are used to make up the finished good. Numeric, 5 positions; required.
Avail	The total quantity available for the component item. **Note:** If you advanced to this screen from the *Display Item/Warehouse Information Screen*, the available quantity reflects the selected warehouse only; otherwise, the quantity reflects all allocatable warehouses. Numeric, 7 positions; display-only.

Screen Option	Procedure
Add a finished good component item	Enter the item code (and SKU information if the item has SKUs) to add the item as a component to the finished good. The item is listed below the other component items in the center of the screen. **Note:** You cannot add a component if there is an open work order for the finished good. See *Finished Good Work Order Processing (WWOR)*.
Change a finished good component item	Select *Change* for a component item to advance to the Change Finished Good Component Item Screen. See the *Create Finished Good Screen* for field descriptions.
Delete a finished good component item	Select *Delete* for a component item to delete it from the finished good.

Screen Option	Procedure
Display a finished good component item	Select *Display* for a component item to advance to the Display Finished Good Component Items Screen. See the *Create Finished Good Screen* for field descriptions.

Updating Items and SKUs

Topics in this part:

- Creating Item/SKU Offers (MISO) describes how to create an item/SKU offer.
- Updating Item/SKU Offers (MUSO) explains the Update SKU Offer screen and its fields. This option updates information on multiple SKU offer records at one time.
- Deleting SKUs for an Item (MDLT) explains how to delete a SKU for a particular item.
- Copying SKU Offer Information (MCSO) describes how to duplicate the information in one offer to another offer.
- Copying Item Warehouse Information (MCIW) explains how to duplicate the item warehouse information in one warehouse to another warehouse.
- Working with Offer Overrides by Item Class (WSOI) explains how to override existing item/offer and SKU/offer information by item class.
- Maintaining SKU Cross Reference Codes (MSKR) describes how to create a cross reference between a Order Administration item and SKU and another system's item and SKU.
- Updating SKU Offer Prices (MUSK) allows you to create SKU/offer prices for specific SKUs of an item and specific offers.
- Maintaining Item/SKU/Offer (CPIM) describes how to recalculate the projected units or update other information in the Item/Offer table.
- Maintaining Item Offers (MIOF) describes how to update item offer information for a specific offer, or to change item information for a specific item.
- Copying SKU/Offer Records (CSKO) describes how to copy SKU offer information from one offer to another.

Creating Item/SKU Offers (MISO)

Purpose: Use Create Item/SKU Offers to indicate that an item is available in an offer and to enter the related pricing and return information.

Using this menu option may be more efficient than selecting the Work with Item/SKUs menu option (fast path = *MITM*) and advancing to the Create Item Offer or the Create SKU Offer screens if, for example, you are entering offer information for a group of existing items and SKUs.

In this topic:

- *Create Item/SKU Offers Screen*
- *Create SKU Offers Screen*

For more information: See *Performing Initial Item Entry (MITM)* for more information on the screens you use to work with items or SKUs.

Create Item/SKU Offers Screen

Purpose: Use this screen to create item and SKU offer information. This screen may be more efficient than selecting the Work with Item/SKUs menu option (fast path = *MITM*) and advancing to the *Create Item Offer Screen* if, for example, you are entering offer information for a group of existing items.

How to display this screen: Enter *MISO* in the Fast path field at the top of any menu or select Create Item/SKU Offer from a menu.

Field	Description
Update SKUs	Indicates whether to update the SKU information. • *Selected* = Update the SKUs. You advance to the *Create SKU Offers Screen* when you press *Enter* so you can enter different information at the SKU level. • *Unselected* = Do not update the SKUs.
Item	A user-defined code that represents a new unit of inventory. Validated against the Item table. Alphanumeric, 12 positions; required.
Offer	The offer you would like to include the item/SKU in. Validated against the Offer table. Alphanumeric, 3 positions; required.
Effective date	The date the price or quantity break discount becomes valid. This date should be on or after the effective date of the offer. If there are multiple effective dates for the same item/offer, the system uses the price associated with the effective date closest to, but not greater than, the order date. For example, if there are effective dates of Feb. 20, and Mar. 31 and the customer placed an order on April 1, the customer receives the price associated with the effective date of March 31. Numeric, 6 positions (in user date format); optional.
Sub page	Informational only. You can use this field to call an external program that creates an item alias outside of Order Administration. The system provides a “hook” to the program when a user defines a sub page code and completes this screen or the *Create Item Offer Screen* in Work with Item/SKUs (fast path = *MITM*). Once the program completes, Order Administration returns to normal processing. Alphanumeric, 5 positions; optional.
Price	The price at which the item will be sold in this offer, if no discounts are applied and the order date is on or after the effective date. Multiple effective dates and prices can be established for the same item/offer. Numeric, 13 positions with a 2-place decimal; required.
Associate price	The price at which the item will be sold in this offer to associate customers. Associate price is used when the Associate field on the order is selected and the order date is equal to or greater than the effective date. Numeric, 13 positions with a 2-place decimal; optional.

Field	Description
Tax inclusive price	The price at which the item will be sold in this offer on orders subject to VAT. In tax-inclusive pricing, a "hidden tax" is included in the order detail line for the item rather than accumulating in the Tax bucket. Included only if the *Tax Included in Price (E70)* system control value is selected. Numeric, 13 positions with a 2-place decimal; optional.
Tax incl assoc price (Tax-inclusive associate price)	The price at which the item will be sold to associate customers on orders subject to VAT. In tax-inclusive pricing, a "hidden tax" is included in the order detail line for the item rather than accumulating in the Tax bucket. Included only if the *Tax Included in Price (E70)* system control value is selected. Numeric, 13 positions with a 2-place decimal; optional.
Special handling	Indicates whether this item is eligible for any type of special handling in this offer (such as monogramming, hemming, etc.). • *Selected* = This item is eligible for special handling. • *Unselected* = This item is not eligible for special handling. If this field is selected and there is a default special handling code defined (see below), *OR* if you specify special handling for an item in order entry, you advance to the *Work with Special Handling Screen* or the *Work with Custom Special Handling Screen*; however, if the special handling code's: • *Suppress S/H window* field is selected: the system adds the special handling code and charge to the item without displaying the special handling screen. • *Bypass S/H* field is selected: you do not advance automatically to the special handling screen unless you enter the special handling code when entering the item; however, you can still advance to the special handling screen by selecting *Special Handling* for the item. See *Special Handling Overview* for more information.
S/H price (Special handling price)	The price to charge the customer for special handling. Use the *Evaluate Special Handling Charges by Order Line (D67)* system control value whether to add the price just once for each order line, or to multiply the special handling price by the unit quantity on the order. Numeric, 13 positions with a 2-place decimal; optional.
S/H code (Special handling code)	The additional charge code associated with the type of special handling you are offering for the item. The system validates that the additional charge code is defined as special handling type standard or custom; the system handles each type in a different way. See *Special Handling Overview* for more information. If you enter a special handling code here, you will advance to the *Work with Special Handling Screen* or *Work with Custom Special Handling Screen* automatically in order entry; however, if the special handling code's: • *Suppress S/H window* field is selected: the system adds the special handling code and charge to the item without displaying the special handling screen. • *Bypass S/H* field is selected: you do not advance automatically to the special handling screen unless you enter the special handling code when entering the item; however, you can still advance to the special handling screen by selecting *Special Handling* for the item. See *Special Handling Overview* for more information. Alphanumeric, 2 positions; optional.

Field	Description
Gift wrap	Indicates whether you offer gift wrapping for this item in this offer. Defaults to *selected* if the Gift Wrap Default (F07) system control value is selected; however, you can override this default. • *Selected* = This item can be gift wrapped. • *Unselected* = This item cannot be gift wrapped.
G/W price (Gift wrap price)	The price you are charging to gift wrap this item. The G/W field must be selected to indicate that this item is eligible for gift wrap. The gift wrap price is multiplied by the unit quantity on the order line to arrive at the total gift wrap charge for the order line. Numeric, 13 positions with a 2-place decimal; optional.
Freight	The freight amount to charge for this item. Multiplied by the unit quantity on the order line to determine the freight charge for this item. Used only if the Freight method field for the Source Code table is set to *By Item* or *Flat Rt/Item*. Numeric, 13 positions with a 2-place decimal; optional.
Hidden freight	Used only with item level freight methods, such as flat rate by item, by item quantity, and by item source. Hidden freight represents the portion of the item's catalog price that is used for freight. You might define a hidden freight value when the freight charge to ship the item is very high. The hidden freight charge is included in the price of the item so the actual freight charge is not visible to the customer. Hidden freight is also know as "theoretical" or "buried" freight. Numeric, 13 positions with a 2-place decimal; optional.
Sale item	Indicates whether the item is on sale. Valid values are: • *selected* = This is a sale item. • *unselected* (default) = This is not a sale item. If the Exclude Sale Item When Prorating Discounts (I65) system control value is selected, this flag controls whether the item is included in prorated discounts or is included when determining whether an order qualifies for a promotion. See the system control value for more information.
Volume discount	Indicates whether this item is eligible for an end-of-order discount that will be applied when you accept the order during Order Entry. • *selected* = The item/SKU is eligible for the volume discount. • *unselected* = The item/SKU is not eligible for the volume discount. See Item Volume Discounting.
Coupon discount $	Represents the amount that is subtracted from the price when the item is ordered from this offer. Numeric, 13 positions with a 2-place decimal; optional.
Coupon expiration date	The date the coupon is effective until (i.e., when it expires). Numeric, 6 positions (in user date format); optional.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Feature/option</td><td>Indicates whether the item is considered a featured or optional item in a depiction. A depiction is a photograph or drawing of several items within an offer. The featured item is the focus of the depiction, whereas the optional items are less prominently displayed. For example, if a dining room is depicted, the dining room set may be the featured item and the individual place settings, crystal, and centerpiece may be the optional items.
Valid values are:
• Feature = Item is the featured item in the depiction.
• Option = Item is an optional item in the depiction.
Optional.</td></tr>
<tr><td>Pickup/new</td><td>Indicates whether the item has been carried over from a previous offer or is new to your product offerings.
Valid values are:
• Pickup = Item is a pickup item, previously sold in another offer.
• New = Item is a new addition in this offer.
Optional.</td></tr>
<tr><td>Warranty</td><td>Defines whether the item in this offer is a warranty item.
Valid values are:
• Selected = The item in this offer is a warrant item. When an operator adds this item to an order in order entry or order maintenance, the system adds the item to the order at no charge.
• Unselected = The item in this offer is not a warranty item.
If the Default Price Override Reason for Warranty Items (G01) system control value contains a price override reason code, the system defaults this code to the Price override code field; otherwise the operator must enter a code.</td></tr>
<tr><td>Required reason code</td><td>Defines whether an Order addition reason code is required when the item in this offer is added to an order in order entry or order maintenance. When you specify an add reason code for an item, there is a record of the add reason code stored in an order line history record, available for review at the Display Order Line History Screen.
Valid values are:
• selected = The item in this offer requires an add reason code when the item is added to an order in order entry or order maintenance. The Enter Add Reason Window opens when an operator adds this item to an order in order entry or order maintenance.
• unselected = The item is this offer does not require an add reason code when the item is added to an order in order entry or order maintenance.

Note:
When the item is added automatically to an order through the order API, the add reason code is not required. For example, an item might be added to an order automatically if it is set up as a free gift by source code.</td></tr>
</table>

Screen Option	Procedure
Work with alias	Select *Work with Alias* to advance to the *Work with Alias Screen*.
Work with SKU offers	*Select* the Update SKUs field and select *OK* to advance to the *Create SKU Offers Screen*. Any information you have entered defaults to this screen.

Create SKU Offers Screen

Purpose: Use this screen to define offer information related to a specific SKU. This screen may be more efficient than selecting the Work with Item/SKUs menu option (fast path = *MITM*) and advancing to the *Create SKU Offer Screen* if, for example, you are entering offer information for a group of existing SKUs.

How to display this screen: *Select* the Update SKUs field at the *Create Item/SKU Offers Screen*. Any information you have entered at that screen defaults here.

Field	Description
Item	A user-defined code that represents a new unit of inventory. Defaults from the previous screen. Alphanumeric, 12 positions; display-only.
Offer	The offer in which you are presenting the SKU. Defaults from the previous screen. Alphanumeric, 3 positions; display-only.
Sel (Select)	Indicates whether the SKU is selected for update. Valid values: • *Select* (default) = The SKU is selected for update. • *Ignore* = The SKU is not selected for update. Required.
Colr Size Othr	The SKU code and description that is used to further define the item. Validated against the SKU Elements (1,2,3) tables; see *Working with SKU Elements (WSK1, WSK2, WSK3)*. Alphanumeric, three 4-position fields; display-only.
Price	The price at which you are selling the item/SKU in this offer, if no discounts are applied, and the offer date is equal to or greater than the effective date. Multiple effective dates and prices can be established for the same item/offer. To establish multiple effective dates, see *Work with Item Prices Screen (Quantity Price Breaks by Offer)*. Numeric, 13 positions with a 2-place decimal; required.
Sale (Sale item)	Indicates whether the item/SKU is on sale in this offer. Valid values are: • *Yes* = this item/SKU is on sale • *No* = this item/SKU is not on sale If the *Exclude Sale Item When Prorating Discounts (I65)* system control value is *selected*, this flag controls whether the item is included in prorated discounts or is included when determining whether an order qualifies for a promotion. See the system control value for more information.
Description	A description of the SKU. Alphanumeric, 40 positions; display-only.

Field	Description
SH? (Special handling)	Indicates whether this item/SKU is eligible for any type of special handling in this offer (such as, monogramming, hemming, etc.). • *Yes* = This item/SKU is eligible for special handling. • *No* = This item/SKU is not eligible for special handling. If this field is set to *Yes* and there is a default special handling code defined (see below), *OR IF* you specify special handling for an item in Order Entry, a pop-up window opens for you to enter special handling instructions.
SH price (Special handling price)	The price that will be charged for special handling. Use the *Evaluate Special Handling Charges by Order Line (D67)* system control value to specify whether to add the price just once for each order line, or multiply the special handling price by the item quantity for the line. Numeric, 13 positions with a 2-place decimal; optional.
S/H (Special handling code)	A code that represents the type of special handling that is required for this item/SKU. The special handling can be either standard or custom; the system handles each type in a different way. See Establishing Additional Charge Codes (WADC) and Establishing Custom Special Handling Formats (WSHF). If you enter a special handling code here, you will advance to the *Work with Special Handling Screen* or *Work with Custom Special Handling Screen* automatically in order entry. Alphanumeric, 2 positions; optional.
GW?(Gift wrap)	Indicates whether this SKU is eligible for gift wrap. If the *Gift Wrap Default (F07)* system control value is *selected*, this field defaults to *Yes*, although you can override it; otherwise, this field defaults to *No*. • *Yes* = The item/SKU can be gift wrapped. • *No* = In this offer, the item/SKU cannot be gift wrapped.
GW price (Gift wrap price)	The price to charge in this offer to gift wrap this item/SKU. The G/W field must be *selected* to indicate that this item/SKU is eligible for gift wrap. The gift wrap price is multiplied by the total unit that is gift wrapped. Numeric, 13 positions with a 2-place decimal; optional.
Frt (Freight)	The freight amount to be charged for this item/SKU. Multiplied by the quantity ordered to determine the freight charge for this item. Used only if the *Freight method* field for the Source Code table is set to *By Item* or *Flat Rt/Item*. Numeric, 13 positions with a 2-place decimal; optional.
Hdn frt (Hidden freight)	Used only with item level freight methods, such as: Flat rate by item, flat rate by item quantity, flat rate by item source, and by item. Hidden freight represents the portion of the item's catalog price that is used for freight. You might define a hidden freight value when the freight charge to ship the item is very high. The hidden freight charge is included in the price of the item so the actual freight charge is not visible to the customer. Hidden freight is also known as "theoretical" or "buried" freight. Numeric, 13 positions with a 2-place decimal; optional.

Field	Description
F/O (feature/option)	Indicates whether the item/SKU is considered a featured or optional item in a depiction in the offer. The featured item is the focus of the depiction; optional items are displayed less prominently. For example, in a depiction of a dress, the shoes and belt depicted may be the optional items. Valid values are: • *Feature* = this is the featured item • *Option* = this is an optional item Optional.
Pickup/new	Indicates whether the item has been carried over from a previous offer or you are presenting it for the first time in this catalog. Valid values are: • *Pickup* = this is a pickup item • *New* = this is a new item Optional.
Tax Inclusive Price	The price at which the item/SKU will be sold in this offer on orders subject to VAT. In tax-inclusive pricing, a "hidden tax" is included in the order detail line for the item rather than accumulating in the Tax bucket. Included only if the *Tax Included in Price (E70)* system control value is *selected*. Numeric, 13 positions with a 2-place decimal; optional.
Asso. price (associate price)	The price at which the item/SKU will be sold in this offer to associate customers. Associate price is used when the Associate field on the order is selected and the order date is equal to or greater than the effective date. Numeric, 13 positions with a 2-place decimal; optional.

Updating Item/SKU Offers (MUSO)

Purpose: Use Update Item/SKU Offers to update information on multiple Item/SKU Offer records at one time.

The *Update Item or SKU Offer(s) Screen* is divided into two sections.

- Use the top section to enter the item and SKU for the offers you wish to update, and the update information. You must complete at least one update field to continue.
- Use the lower portion of the screen to enter the offers that you want to update.

The system updates only those fields in which you enter data; all other fields will remain as is.

You can update both the item offer and SKU offer by making changes for the “base” item and leaving the SKU field blank. When you select *OK* to accept the changes, you advance to the *Confirm Multiple SKU Offer Update Window* where you *select* the Update ALL SKU Offers for base item field.

Defaulting active offers: If the *Default Active Offers (J07)* system control value is selected and you do not manually enter an offer in the Offer fields, the system defaults the 20 most recent active offers to the Offer fields for the entered item: `Offers have been defaulted - press Enter to update`.

The offers default to the Offer fields in descending Start date sequence.

- If you enter an item without a SKU code, the system defaults the 20 most recent active offers defined for the item.
- If you enter an item and SKU code, the system defaults the 20 most recent active offers defined for the SKU. The system will not default any item offers, even if no SKU offers exist.

Note:

- If the item is not assigned to 20 active offers, the system defaults the available active offers assigned to the item. For example, if the item is assigned to 25 offers, but only 8 offers are active, the system defaults the 8 active offers.
- If the item is assigned to more than 20 active offers, the system evaluates the offer's Start date to determine the 20 most recent active offers to default.
- If active offers do not exist for the item, the Offer fields remain blank and you must manually enter offers in the Offer fields.
- If you update the Item and/or SKU field, the system will not update the defaulted offers.
- You can manually enter an offer that is a future offer or expired offer.

Update Item or SKU Offer(s) Screen

Use this screen to update information on multiple Item/SKU Offer records at one time.

How to display this screen: Enter *MUSO* in the Fast Path field at the top of any menu or select Update Item/SKU from a menu.

Field	Description
Item	A unit of inventory. Item codes are defined in and validated against the Item table. Alphanumeric, 12 positions; required.
Clr Size Wdth (SKU codes)	The item's unique characteristics, such as its color and size. Alphanumeric, three 4-position fields; required if SKU/offer records exist.
Effective date	The date the price or quantity break discount becomes valid. This date should be equal to or greater than the effective date of the offer. The customer receives this price when placing an order on this date or later, if the order is for a great enough quantity. If you establish multiple effective dates for the same item/offer, the system uses the price associated with the effective date closest to, but not greater than, the order date. *Example:* If you establish effective dates of Feb. 20, and Mar. 31 and the customer places an order on April 1, the customer receives the price associated with the effective date of March 31. Numeric, 6 positions (in user date format); optional.

Field	Description
Price	The price at which you are selling the item in this offer, if no discounts are applied, and the order date is on or after the effective date. You can establish multiple effective dates and prices for the same item/offer. See *Work with Item Prices Screen (Quantity Price Breaks by Offer)*. Numeric, 13 positions with a 2-place decimal; required.
Associate price	The price at which you are selling the item in this offer to associate customers. The system uses the associate price when the Associate field on the order is selected and the customer places the order on or after the effective date. Numeric, 13 positions with a 2-place decimal; optional.
Tax inclusive price	The price at which the item will be sold in this offer on orders subject to VAT. In tax-inclusive pricing, a "hidden tax" is included in the order detail line for the item rather than accumulating in the Tax bucket. Included only if the *Tax Included in Price (E70)* system control value is selected. Numeric, 13 positions with a 2-place decimal; optional.
Tax-inclusive (Tax-inclusive associate price)	The price at which the item will be sold to associate customers on orders subject to VAT. In tax-inclusive pricing, a "hidden tax" is included in the order detail line for the item rather than accumulating in the Tax bucket. Included only if the *Tax Included in Price (E70)* system control value is selected. Numeric, 13 positions with a 2-place decimal; optional.
Sale item	Indicates whether the item is on sale in this offer. Valid values are: • *selected* = this item is on sale • *unselected* = this item is not on sale If the *Exclude Sale Item When Prorating Discounts (I65)* system control value is selected, this flag controls whether the item is included in prorated discounts or is included when determining whether an order qualifies for a promotion. See the system control value for more information.
Freight	The freight amount to be charged for this item. Multiplied by the quantity ordered. Used only if the *Freight method* for the source code is *By Item* or *Flat Rt/Item*. Numeric, 13 positions with a 2-place decimal; optional.
Hidden freight	The system uses this value only with item level freight methods such as flat rate by item, flat rate by item quantity, flat rate by item source, and by item. Hidden freight represents the portion of the item's catalog price that pays freight. You can define a hidden freight value when the freight charge for the item is very high. You include the hidden freight charge in the item price so that the customer is not aware of the actual cost of shipping. Hidden freight is also known as “theoretical” or “buried” freight. Numeric, 13 positions with a 2-place decimal; optional.

Field	Description
S/H (Special handling)	Indicates whether this item is eligible for any type of special handling in this offer (such as monogramming, hemming, etc.). • *selected* = This item is eligible for special handling. • *unselected* = This item is not eligible for special handling. If this field is selected and there is a default special handling code defined (see below), *OR* if you specify special handling for an item in order entry, you advance to the *Work with Special Handling Screen* or the *Work with Custom Special Handling Screen*; however, if the special handling code's: • *Suppress S/H window* field is selected: the system adds the special handling code and charge to the item without displaying the special handling screen. • *Bypass S/H* field is selected: you do not advance automatically to the special handling screen unless you enter the special handling code when entering the item; however, you can still advance to the special handling screen by selecting *Special Handling* for the item. See *Special Handling Overview* for more information.
Volume discount	Determines whether you can apply discounts to the item for large order quantities. • *selected* = This item is eligible for volume discount. • *unselected* = This item is not eligible for volume discount. See *Item Volume Discounting*.
S/H charge code (Special handling code)	The additional charge code associated with the type of special handling you are offering for the item. The system validates that the additional charge code is defined as special handling type standard or custom; the system handles each type in a different way. See *Special Handling Overview* for more information. If you enter a special handling code here, you will advance to the *Work with Special Handling Screen* or *Work with Custom Special Handling Screen* automatically in order entry; however, if the special handling code's: • *Suppress S/H window* field is selected: the system adds the special handling code and charge to the item without displaying the special handling screen. • *Bypass S/H* field is selected: you do not advance automatically to the special handling screen unless you enter the special handling code when entering the item; however, you can still advance to the special handling screen by selecting *Special Handling* for the item. See *Special Handling Overview* for more information. Alphanumeric, 2 positions; optional.
Price (Special handling price)	The price to charge for special handling of the item. The system multiplies this charge by the total unit quantity if the *Evaluate Special Handling Charges by Order Line (D67)* system control value is unselected. Numeric, 13 positions with a 2-place decimal; optional.

Field	Description
G/W flag (Gift wrap flag)	Indicates whether this item is eligible for gift wrapping in this offer. If the *Gift Wrap Default (F07)* system control value is selected, this field will default to selected; however, you can override this value. • *selected* = The item can be gift wrapped. • *unselected* = The item cannot be gift wrapped.
Price (Gift wrap price)	The price to charge for gift wrapping the item. The system multiplies the gift wrap price by the total unit quantity gift wrapped. Numeric, 13 positions with a 2-place decimal; optional.
Feature/option	Indicates whether the item is considered a featured or optional item in a depiction in the offer. The featured item is the focus of the depiction; optional items are displayed less prominently. For example, in a depiction of a dress, the shoes and belt depicted might be optional items. Valid values are: • *Feature* = This is a feature item. • *Option* = This is an optional item. Optional.
Pickup/new	Indicates whether the item has been carried over from a previous offer or you are presenting it for the first time in this offer. Valid values are: • *Pickup* = This is a pickup item. • *New* = This is a new item. Optional.
Warranty	Defines whether the item in this offer is a warranty item. Valid values are: • *selected* = The item in this offer is a warranty item. When an operator adds this item to an order in order entry or order maintenance, the system adds the item to the order at no charge. • *unselected* = The item in this offer is not a warranty item. If the *Default Price Override Reason for Warranty Items (G01)* system control value contains a price override reason code, the system defaults the code to the Price override code field; otherwise the operator must enter a code.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Required reason code</td><td>Defines whether an Order addition reason code is required when the item in this offer is added to an order in order entry or order maintenance. When you specify an add reason code for an item, there is a record of the add reason code stored in an order line history record, available for review at the Display Order Line History Screen.

Valid values are:
• selected = The item in this offer requires an add reason code when the item is added to an order in order entry or order maintenance. The Enter Add Reason Window opens when an operator adds this item to an order in order entry or order maintenance.
• unselected = The item is this offer does not require an add reason code when the item is added to an order in order entry or order maintenance.

Note:
When the item is added automatically to an order through the order API, the add reason code is not required. For example, an item might be added to an order automatically if it is set up as a free gift by source code.</td></tr>
<tr><td>Offers</td><td>The offers where the item/SKU should be updated.

If the Default Active Offers (J07) system control value is selected and you do not manually enter an offer in the Offer fields, the system defaults the 20 most recent active offers to the Offer fields for the entered item. The offers default to the Offer fields in descending Start date sequence.

Offers are defined in and validated against the Offer table. See Working with Offers (WOFR).

Alphanumeric, twenty 3 position fields; required.</td></tr>
<tr><td>Create if record does not exist</td><td>Controls whether to create the Item/offer or SKU/offer record automatically if it doesn't already exist.
• selected = Create the record.
• unselected (default) = Do not create the record.

Note:
If this field is unselected and the Update all SKU offers for base item field is selected, the system creates SKU Price records only for those SKUs that are already associated with the offer.</td></tr>
</table>

Screen Option	Procedure
Display item/offer or SKU/offer records	Select *Display Offers* to advance to the Work with Item Offers Screen or *Work with SKU Offers Screen*. If the item is a SKU'ed item, you must specify a SKU code before displaying offers.

Confirm Multiple SKU Offer Update Window

Use this window to update the item offer and all SKU offers for the item.

Select the Update ALL SKU Offers for base item field to update both the item offer and all SKU offers for this "base" item.

> **Note:**
>
> If the Update ALL SKU Offers for base item field is *selected* and the Create if record does not exist field is *unselected*, the system creates SKU Price records only for those SKUs that are already associated with the offer.

If you select *Exit* or *select* this field, the system updates the item or SKU offer(s) entered and clears the fields so that you can update another item/SKU offer if desired.

Deleting SKUs for an Item (MDLT)

Purpose: The Delete SKUs for Item function deletes all SKU records for an item.

Example: Item BK4000 (a blanket) has three SKUs (BLUE, BONE, and GOLD). If you enter the item number (BK4000) at the Delete SKUs for an Item screen, all the SKU records (BLUE, BONE, and GOLD) will be deleted.

How to display this screen: Enter *MDLT* in the Fast Path field at the top of any menu or select this option from a menu.

Field	Description
Company	Defaults to the company in which you are working. You can override the company code to another valid company, as defined in the Company table. Alphanumeric, 3 positions; optional.
Item number	A user-defined code that represents a unit of inventory. In this case, the item must have SKUs associated with it. Validated against the Item table. Alphanumeric, 12 positions; required.

> **Important:**
>
> You cannot delete SKUs if there is on-hand quantity, open orders, or open purchase orders.

Copying SKU Offer Information (MCSO)

Purpose: Use Copy SKU Offer Information to copy item/SKUs from one offer to another offer by selecting an offer to copy "from" and the new offer to be created "to."

Copy SKU Offer Information allows you to:

- copy all item/SKUs from one offer to another offer
- copy item/SKUs from one offer to another offer by item class
- update existing item/SKU offers in the "to" offer with information in the "from" offer
- select which item/SKU information to copy

You can also copy a selected SKU offer record from one offer to another offer using the *Copying SKU/Offer Records (CSKO)* menu option.

Copy SKU/Offer Information Screen (Selecting Information to Copy)

How to display this screen: Enter *MCSO* in the Fast path field at the top of any menu or select Copy SKU Offer Information from a menu.

Field	Description
From offer	The offer from which the information will be copied. This must be a valid offer in the Offer table. See *Working with Offers (WOFR)*. Alphanumeric, 3 positions; required.
To offer	The offer to which the information will be copied. This must be a valid offer in the Offer table. Alphanumeric, 3 positions; required.
Item class(es)	The item class(es) from which the information in the “from” offer will by copied. Each must be a valid item class in the Item Class table; see *Working with Item Classes (WICL)*. You can maintain item/SKU offers by item class through *Working with Offer Overrides by Item Class (WSOI)*. Alphanumeric, ten 3-position fields; optional.
Update SKU and item offers	Indicates whether the system updates existing item/SKU information in the “to” offer with the copied information in the “from” offer. Valid values are: *unselected* (default) = Existing item/SKU information in the “to” offer will not update with the copied information in the “from” offer. *selected* = Existing item/SKU information in the “to” offer will update with copied information in the “from” offer. *Example:* Item "Sunglasses" exists in offers 1 and 2. In offer 1, the price of the sunglasses is $10.00 and in offer 2 the price of the sunglasses is $20.00. If you are copying information from offer 2 to offer 1 and this field is selected, the price in offer 1 will update to $20.00. If this field is unselected, the price will not update and only new information will copy to offer 1.

Field	Description
	Note: Each of the field descriptions below describes the information to copy from the "from" offer to the "to" offer if the field is selected.
Freight	The freight amount to be charged for this item. Multiplied by the quantity ordered. Used only if the *Freight method* for the source code is *By Item* or *Flat Rt /Item*. Valid values are: *unselected* = In the "to" offer, the freight amount will not change. *selected* (default) = Item/SKUs in the "to" offer will default the *Freight* from the "from" offer.
Sale item	Indicates whether the item is on sale. Valid values are: *selected* (default) = The items in the "to" offer will have the same Sale item setting as the items in the "from" offer. *unselected* = In the "to" offer, the *Sale item* setting for the item will not be changed. If the *Exclude Sale Item When Prorating Discounts (I65)* system control value is selected, this flag controls whether the item is included in prorated discounts or is included when determining whether an order qualifies for a promotion. See the system control value for more information.
S/H (Special handling)	This item is eligible for any type of special handling in this offer (such as, monogramming, hemming, etc.). *selected* (default) = The items in the "to" offer will have the same special handling as the in "from" offer. *unselected* = In the "to" offer, the *Special handling* field for the items will not be changed.
Coupon discount	Represents the amount that is subtracted from the price when the item/SKU is ordered from this offer. Valid values are: *selected* (default) = The items in the "to" offer will have the coupon discount amount as in the "from" offer. *unselected* = In the "to" offer, the *Coupon discount $ (Coupon discount dollars)* for the items will not change.
S/H code (Special handling code)	Represents the type of special handling that is required for this item. If you enter a special handling code, during Order Entry a pop-up window appears. When this item is ordered, you can specify the quantity ordered, a special handling charge (if different), and special handling instructions. Valid values are: *selected* (default) = The items in the "to" offer will have the same special handling codes as in the "from" offer. *unselected* = In the "to" offer, the *S/H code (Special handling code)* for the items will not change.

Field	Description
S/H price (Special handling price)	The price to charge the customer for special handling. You can specify in the *Evaluate Special Handling Charges by Order Line (D67)* system control value whether to add the price just once for each order line, or multiply the special handling price by the item quantity for the line. *selected* (default) = The items in the “to” offer will have the same special handling price as in the “from” offer. *unselected* = In the “to” offer, the *S/H price (Special handling price)* field for the items will not be changed.
G/W (Gift wrapping)	A value that indicates whether items can be gift wrapped. *selected* (default) = The items in the “to” offer will have the gift wrap flag set the same way as in the “from” offer. *unselected* = In the “to” offer, the *Gift wrap* flag for the items will not be changed.
Hidden freight	Used only with item level freight methods, such as: Flat rate by item, flat rate by item quantity, flat rate by item source, and by item. Hidden freight represents the portion of the item's catalog price that is used for freight. You might define a hidden freight value when the freight charge to ship the item is very high. The hidden freight charge is included in the price of the item so the actual freight charge is not visible to the customer. Hidden freight is also known as “theoretical” or “buried” freight. Valid values are: *selected* (default) = The items in the “to” offer will have the same hidden freight amount as in the “from” offer. *unselected* = In the “to” offer, the *Hidden freight* amount for the items will not be changed.
G/W price (Gift wrapping price)	The price in this offer that will be charged to gift wrap this item. The G/W field must be selected to indicate that this item is gift wrap-eligible. The gift wrap price will be charged for each unit of this item that is gift wrapped. The system will multiply this charge by the order quantity for the item. *selected* (default) = The items in the “to” offer will have the same gift wrapping price as in the “from” offer. *unselected* = In the “to” offer, the *G/W price (Gift wrap price)* for the items will not be changed.
Volume discount	Indicates whether this item is eligible for an end-of-order discount that will be applied when you accept the order during Order Entry. See *Item Volume Discounting*. Valid values are: *selected* (default) = The items in the “to” offer will have the same volume discount setting as in the “from” offer. *unselected* = In the “to” offer, the *Volume discount* field for the items will not be changed.

Field	Description
SKU price	The price at which the item/SKU will be sold in this offer. Valid values are: *selected* (default) = The items in the “to” offer will have the same SKU price as in the “from” offer. *unselected* = In the “to” offer, the *Price* field for the items will not be changed. If the *Tax Included in Price (E70)* system control value is selected, the message *Includes Tax price* displays next to this field. This message indicates that both the offer price and the tax-inclusive price will be copied if you set the SKU price flag to *Y*.
Associate price	The price at which the item will be sold in this offer to associate customers. A customer pays the associate price when the Associate flag on an order is selected. Valid values are: *selected* (default) = The items in the “to” offer will have the same associate price as in the “from” offer. *unselected* = In the “to” offer, the *Associate price* field for the items will not be changed. If the *Tax Included in Price (E70)* system control value is selected, the message *Includes Tax Price* displays next to this field. This message indicates that both the offer associate price and the tax-inclusive associate price will be copied if you set the Associate price flag to *Y*.
Coupon effective date	The date the coupon becomes effective. Valid values are: *selected* (default) = The items in the “to” offer will have the same coupon effective date as in the “from” offer. *unselected* = In the “to” offer, the *Coupon expiration date* for the items will not be changed.
Warranty	Defines whether the item in this offer is a warranty item. Valid values are: *selected* (default) = The items in the “to” offer will have the same warranty setting as in the “from” offer. *unselected* = In the “to” offer, the *Warranty* field for the items will not be changed.
Feature/option	Indicates whether the item is considered a featured or optional item in a depiction. A depiction is a photograph or drawing of several items within an offer. The featured item is the focus of the depiction; whereas, the optional items are less prominently displayed. For example, if a dining room is depicted, the dining room set may be the featured item and the individual place settings, crystal, and centerpiece may be the optional items. Valid values are: *selected* (default) = The items in the “to” offer will have the same feature/option setting as in the “from” offer. *unselected* = In the “to” offer, the *Feature/option* field for the items will not be changed.

Field	Description
Required reason	Defines whether an *Order addition reason code* is required when the item in this offer is added to an order in order entry or order maintenance. When you specify an add reason code for an item, there is a record of the add reason code stored in an order line history record, available for review at the *Display Order Line History Screen*. Valid values are: • *selected* = The item in this offer requires an add reason code when the item is added to an order in order entry or order maintenance. The *Enter Add Reason Window* opens when an operator adds this item to an order in order entry or order maintenance. • *unselected* = The item is this offer does not require an add reason code when the item is added to an order in order entry or order maintenance. **Note:** When the item is added automatically to an order through the order API, the add reason code is not required. For example, an item might be added to an order automatically if it is set up as a free gift by source code
Pickup/new	Indicates whether the item has been carried over from a previous offer or is new to your product offerings. Valid values are: *selected* (default) = The items in the “to” offer will have the same pickup/new setting as in the “from” offer. *unselected* = In the “to” offer, the *Pickup/new* field for the items will not be changed.

Copying Item Warehouse Information (MCIW)

Purpose: Use this screen to copy Item Warehouse records from one warehouse to another. This function is useful if you are setting up a new warehouse that carries the same items as another warehouse.

You must specify the “from” and “to” warehouse and indicate whether to replace existing Item Warehouse records.

How to display this screen: Enter *MCIW* in the Fast path field at the top of any menu or select Copy Item Warehouse Information from a menu.

Field	Description
From warehouse	The numeric code that represents the source warehouse that you want to copy from. Validated against the Warehouse table. See *Creating and Maintaining Warehouses (WWHS)*. Numeric, 3 positions; required.

Field	Description
To warehouse	The numeric code that represents the target warehouse that you want to copy to. Validated against the Warehouse table. Numeric, 3 positions; required.
Replace existing records	Valid values are: *Selected* = Any existing “to” warehouse records will be replaced during the copy procedure. *Unselected* = Any existing “to” warehouse records will not be replaced during the copy procedure. Records which may exist in the “to” warehouse but not the “from” warehouse will remain as is in the “to” warehouse.
Copy min/max (Copy minimum quantity/ maximum quantity)	Indicates whether you wish to copy the minimum and maximum quantities defined for the item warehouse records in the "from" warehouse to the "to" warehouse. Valid values are: *Selected* = Copy the minimum and maximum quantities defined for the item warehouse records in the “from” warehouse to the “to” warehouse. *Unselected* (default) = Do not copy the minimum and maximum quantities defined for the item warehouse record in the “from” warehouse to the “to” warehouse.
Copy prices (Copy retail prices)	Indicates whether you wish to copy the original retail price and current retail price defined for the item warehouse records in the "from" warehouse to the "to" warehouse. Valid values are: *Selected* = Copy the original retail price and current retail price defined for the item warehouse records in the “from” warehouse to the “to” warehouse. *Unselected* (default) = Do not copy the original retail price and current retail price defined for the item warehouse records in the “from” warehouse to the “to” warehouse.

Submitting the job: If you choose to continue with the copy procedure, the system submits *CPYITW_REC* job.

Working with Offer Overrides by Item Class (WSOI)

Purpose: Use Work with Item Offer Overrides by Class to override existing item/offer and SKU/offer information by item class. You can update item offer information at different levels:

- override the entire item class: update all items in the item class and offer with the information you enter
- override a specific item: update only selected items in the item class and offer with the information you enter
- override a specific SKU: update only selected SKUs in the item class and offer with the information you enter

Why use? Overriding existing item/SKU offer information by item class is helpful if you include an entire item class in one offer. You can copy item/SKUs from one offer to another by item class through *Copying SKU Offer Information (MCSO)*.

> **Note:**
>
> You cannot use Item Offer Overrides by Class to override item/SKU pricing information that includes value added tax (VAT). On orders subject to VAT, tax does not accumulate in the Tax field; instead, the customer pays a tax-inclusive price for each item and the tax is “hidden” on the order detail line in the Hidden tax field. See the *Tax Included in Price (E70)* system control value.

In this topic:

- *Item Offer Overrides by Item Class Screen*
- *First Item/Offer Override Details Screen*
- *Second Item/Offer Override Details Screen*
- *First SKU/Offer Override Details Screen*
- *Second SKU/Offer Override Details Screen*

Item Offer Overrides by Item Class Screen

How to display this screen: Enter *WSOI* in the Fast path field at the top of any menu or select Work with Item Offer Overrides by Class from a menu.

Field	Description
Item class	The item class code for the items and SKUs you wish to update. See *Working with Item Classes (WICL)*. The item class code is used in conjunction with the offer code. This option only updates items and SKUs that are in the item class and offer you enter. Alphanumeric, 3 positions; required.
Offer	The offer you wish to update. See *Working with Offers (WOFR)*. The offer is used in conjunction with the item class code. This option only updates items and SKUs that are in the item class and offer you enter. Alphanumeric, 3 positions; required.
Effective date	The starting date for an item price break in this offer. This item quantity discount is available until the next effective date, if any. Effective date is from the Effective date field in the Item Price table. Numeric, 6 positions (in user date format); display-only.
Price	The offer price for item/SKUs in the offer and item class you selected. Numeric, 13 positions with a 2-place decimal; optional.
Associate price	The associated offer price for item/SKUs in the offer and item class you selected. Numeric, 13 positions with a 2-place decimal; optional.
Special handling	Indicates whether an item/SKU is eligible for any type of special handling (such as monogramming) in this offer. *Selected* = The item/SKU is eligible for special handling. *Unselected* = The item/SKU is not eligible for special handling.

Field	Description
S/H price (Special handling price)	The price to charge when for special handling. This is the price per unit for special handling, multiplied by the quantity ordered. The following message indicates if you enter a price without *selecting* the Special handling field: `Special handling price not allowed when not eligible`. Numeric, 13 positions with a 2-place decimal; optional.
S/H code (Special handling code)	The additional charge code for the type of special handling you are offering for the item. The special handling can be either standard or custom; the system handles each type in a different way. See *Establishing Additional Charge Codes (WADC)* and *Establishing Custom Special Handling Formats (WSHF)*. If you enter a special handling code here, you advance to the *Work with Special Handling Screen* or *Work with Custom Special Handling Screen* automatically in order entry. The following message indicates if you enter a price without *selecting* the Special handling field: `Special handling price not allowed when not eligible`. Alphanumeric, 2 positions; optional.
Gift wrap (Gift wrap flag)	Indicates whether the item/SKU can be gift wrapped. Valid values are: *Selected* = Eligible for gift wrap. *Unselected* = Not eligible for gift wrap.
G/W price (Gift wrap price)	The price in this offer to charge for gift wrapping. The gift wrap price is multiplied by the order quantity for the item/SKU. The following message indicates if you enter a price without *selecting* the Gift wrap field: `Gift Wrap Price not allowed when gift wrap flag is No`. Numeric, 13 positions with a 2-place decimal; optional.
Freight	The freight amount to charge for this item, multiplied by the quantity ordered. Used only if the source code uses *By Item* or *Flat Rt/Item*. Numeric, 13 positions with a 2-place decimal; optional.
Hidden freight	Used only with item level freight methods, such as: Flat rate by item, flat rate by item quantity, flat rate by item source, and by item. *What is hidden freight?* Hidden freight represents the portion of the item/SKU's catalog price that is used for freight. You can define a hidden freight value when the freight charge to ship the item/SKU is very high. The hidden freight charge is included in the price of the item/SKU so the actual freight charge is not visible to the customer. Hidden freight is also known as "theoretical" or "buried" freight. Numeric, 13 positions with a 2-place decimal; optional.

Field	Description
Sale item	Indicates whether the item/SKU is on sale in this offer. Valid values are: *Selected* = The item/SKU is on sale. *Unselected* = The item/SKU is not on sale. If the *Exclude Sale Item When Prorating Discounts (I65)* system control value is *selected*, this flag controls whether the item is included in prorated discounts or when determining whether an order qualifies for a promotion. See the system control value for more information.
Volume discount	Indicates whether this item is eligible for an end-of-order discount that will be applied when you accept the order during Order Entry. • *selected* = The item/SKU is eligible for the volume discount. • *unselected* = The item/SKU is not eligible for the volume discount. See *Item Volume Discounting*.
Coupon discount $ (Coupon discount dollars)	The amount to subtract from the price when the item/SKU is ordered from this offer. Numeric, 13 positions with a 2-place decimal; optional.
Coupon expiration date	The date the coupon is no longer valid. Numeric, 6 positions (in user date format); optional.
Feature/option	Indicates whether the item/SKU is considered a featured or optional item in a depiction in the offer. The featured item is the focus of the depiction; optional items are displayed less prominently. For example, in a depiction of a dress, the shoes and belt depicted may be the optional items. Valid values are: *Feature* = This is the featured item/SKU. *Option* = This is an optional item/SKU. blank (default) = The existing value in the item/offer or SKU/offer remains unchanged. Optional.
Pickup/new	Indicates whether the item/SKU has been carried over from a previous offer or you are presenting it for the first time in this catalog. Valid values are: *Pickup* = This is a pickup item/SKU. *New* = This is a new item/SKU. Optional.

Field	Description
Warranty required	Indicates whether the item is a warranty item. Valid values are: *Selected* = In this offer, the item is a warranty item. When an operator adds this item to an order in order entry or order maintenance, the system adds the item to the order at no charge. *Unselected* = In this offer, the item is not a warranty item. If there is a price override code specified in the *Default Price Override Reason for Warranty Items (G01)* system control value, the system defaults this code to the Price override code field; otherwise, the operator must enter a code.
Required reason code	Defines whether an *Order addition reason code* is required when the item in this offer is added to an order in order entry or order maintenance. When you specify an add reason code for an item, there is a record of the add reason code stored in an order line history record, available for review at the *Display Order Line History Screen*. Valid values are: • *selected* = The item in this offer requires an add reason code when the item is added to an order in order entry or order maintenance. The *Enter Add Reason Window* opens when an operator adds this item to an order in order entry or order maintenance. • *unselected* = The item is this offer does not require an add reason code when the item is added to an order in order entry or order maintenance. **Note:** When the item is added automatically to an order through the order API, the add reason code is not required. For example, an item might be added to an order automatically if it is set up as a free gift by source code.

Instructions:

1. Enter a valid item class in the Item class field and a valid offer in the Offer field.
2. The system defaults the descriptions of the item class and offer and each additional field on this screen becomes enterable.
3. Complete the additional fields as described above.
4. Select *OK* once you have completed all the overrides. Any overrides you enter on this screen will update all item/SKUs in the item class and offer. You can then create exceptions to the override you entered for a specific item or SKU. See Overriding Item Offer Details and Overriding SKU Offer Details later in this topic for more information.
5. Select *Item/Offer Details* to override information for a specific item, or

6. If you do not want to override existing information for a specific item or SKU, you can select *Accept* to accept the overrides on this screen or select *Exit* to cancel. If you select *Accept*, the Confirm Accept pop-up window opens. Select *OK* to accept the overrides or select *Exit* to cancel.
7. If you select *OK* to accept the changes, you return to the previous screen and the following message informs you that the overrides have been submitted: `Job (ICL_OVRDS) has been submitted to batch.`

> **Note:**
>
> Once you select *Item/Offer Details* to advance to the *First Item/Offer Override Details Screen*, you can no longer return to this screen.

Screen Option	Procedure
Override offer details for a specific item	Select *Item/Offer Details* to advance to the *First Item/Offer Override Details Screen*.
Accept the overrides you have entered	Select *Accept*.

First Item/Offer Override Details Screen

Purpose: Use this screen to override a specific item in the item class and offer you entered on the *Item Offer Overrides by Item Class Screen*. Any information you entered on the *Item Offer Overrides by Item Class Screen* defaults.

How to display this screen: Select *Item/Offer Details* on the *Item Offer Overrides by Item Class Screen*.

Field descriptions: The Offer, Item class, Effective date, Special handling and Special handling code fields are described under *Item Offer Overrides by Item Class Screen*.

Field	Description
Item	An item that belongs to the item class and offer you entered on the *Item Offer Overrides by Item Class Screen* **Note:** Item codes for items that have SKU/ offer records but not item/offer records are in a different color than items with an item/offer record. You also cannot override the Page, Effective date, Special handling and Special handling code fields for an item that does not have an item/ offer record. An item that does not have SKUs and that also does not an item/offer record is not listed on this screen. Alphanumeric, 12 positions; optional.

Field	Description
SKU'ed	A value that identifies whether this item is a SKUed item.Valid values are: *Unselected* = This item has SKU's. *Selected* = This item does not have SKU's. You can enter an override for a specific SKU by selecting *SKU/ Offer Details* for the item whose SKUs you wish to work with. See *First SKU/Offer Override Details Screen*.

Instructions:

1. Enter information as described above.
2. Select *OK*.
3. Select *SKU/Offer Details* for an item containing SKUs to change any of the override information for a specific SKU. See *First SKU/Offer Override Details Screen*, or
4. If you do not want to override offer information for a specific SKU, select *Accept* to accept all of the overrides you have entered on *Item Offer Overrides by Item Class Screen* and the *First Item/Offer Override Details Screen*. Select *OK* at the confirmation window to accept the overrides or select *Exit* to cancel.
5. You can also reject the overrides you have entered for items/SKUs in the item class and offer by selecting *Reject*.

Screen Option	Procedure
Change additional information for a specific item	Select *Copy* for an item to advance to the *Second Item/Offer Override Details Screen*.
Override offer information for a specific SKU	Select *SKU/Offer Details* for an item to advance to the *First SKU/Offer Override Details Screen*.
Accept the overrides you have entered	Select *Accept*.
Reject the overrides you have entered	Select *Reject*.

Second Item/Offer Override Details Screen

Purpose: Use this screen to override item/offer details for a specific item.

How to display this screen: On the *First Item/Offer Override Details Screen*, select *Change* for an item.

Field descriptions: See *First Item/Offer Override Details Screen* for field descriptions.

Completing this screen: Once you have completed all the overrides you wish to make, select *Exit* to return to the *First Item/Offer Override Details Screen*.

First SKU/Offer Override Details Screen

Purpose: Use this screen to override item/offer details for a specific SKU.

How to display this screen: On the *First Item/Offer Override Details Screen*, select *SKU/ Offer Details* for a SKUed item.

Field descriptions: Additional fields are described under *First Item/Offer Override Details Screen*.

> **Note:**
>
> If there is no SKU/Offer for a specific SKU, the SKU is not listed on this screen.

Field	Description
Colr size othr (Stock keeping unit)	The special characteristics for this item. Alphanumeric, three 4-position fields; optional.

Screen Option	Procedure
Change additional information for a specific SKU	Select *Change* for a SKU to advance to the *Second SKU/Offer Override Details Screen*.

Second SKU/Offer Override Details Screen

Purpose: Use this screen to change additional SKU/offer information for a specific SKU.

How to display this screen: On the *First SKU/Offer Override Details Screen*, select *Change* for a SKU.

Field descriptions: See *First Item/Offer Override Details Screen* for field descriptions.

Maintaining SKU Cross Reference Codes (MSKR)

Purpose: Use Maintain SKU Cross Reference to create and work with SKU cross reference codes for each item or SKU sold in an offer. You can use SKU cross reference codes as a way to create a cross reference between a Order Administration item and SKU code and the item and SKU in another system, such as ChannelAdvisor.

About the ChannelAdvisor integration: See *ChannelAdvisor Integration Overview* and *ChannelAdvisor Setup* for more information.

Cross reference codes in OEOM: Creating cross reference codes for each item and SKU sold in an offer allows an operator to enter the cross reference code in the Item field when entering a line in order entry or order maintenance. When the operator adds the line to the order, the system searches the SKU Cross Reference table for the item or SKU that is associated with the cross reference code. When the system finds the item that is related to the cross reference code the operator entered, the system defaults the Order Administration item and SKU to the order.

Example:

Order Administration item/SKU: KAL555 GREY WMNS SMLL

SKU cross reference code: 525KL

When the operator enters 525KL in the Item field in order entry or order maintenance, the system defaults the Order Administration item KAL555 in the Item field and the Order Administration SKU GREY WMNS SMLL in the SKU field.

If the operator enters a SKU cross reference code that is not associated with a Order Administration item or SKU or if the operator enters a valid SKU cross reference code but also enters a SKU code, an error message such as the following indicates if the operator attempts to add the line to the order:

Base item (525KL) is missing or invalid.

Restrictions on using SKU cross references to identify items/SKUs:

- *Interactive order entry:* Since the Item field is 12 positions, the SKU cross reference code cannot exceed 12 positions in order to identify the item/SKU in interactive order entry.
- *Order API:* The generic order interface does not support using SKU cross reference codes to identify items. See *Resolving the Item and SKU in the Order API* for a discussion.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

The ChannelAdvisor integration supports using a SKU cross reference of up to 40 positions. See *ChannelAdvisor Integration Overview* for background.

Which offer is used for the order detail line?

When an operator enters a SKU cross reference code in the Item field in order entry or order maintenance, the system uses the offer on the order detail line to determine the price of the item, not the offer where the SKU cross reference code was defined. If a price has not been defined for the item in the offer on the order detail line, the error message Price (.00) cannot be zero for item displays and the operator must manually enter a price.

What if more than one item and SKU is defined with the same cross reference number?

The system searches offers alphanumerically for an item and SKU that contain the cross reference number, selecting the first item and SKU it finds.

Example:

Offer	Item	SKU	Reference Number
A01	A123	BLUE	321RG
A01	A123	RED	321RG
B01	B123	BLUE	321RG
B01	B123	RED	321RG

In order entry and order maintenance, the system defaults the Order Administration item A123 and the Order Administration SKU BLUE, when an operator enters the reference number 321RG in the Item field.

In this situation, when an operator enters the cross reference number 321RG in the Item field, the system searches offers in alphanumeric order for a Order Administration item and SKU. Then, within the first offer where the system finds a match, the system selects the first Order Administration item and SKU it finds containing the cross reference number. For example, if a Order Administration item and SKU in offer A01 was not associated with the cross reference number 321RG, the system would then search offer B01 for a Order Administration item and SKU that was associated with the cross reference number.

In this topic:

- *Work with SKU Cross Reference Screen (Selecting an Offer)*

- Maintain SKU Cross Reference Screen
- Create SKU Cross Reference Codes
- Change SKU Cross Reference Codes

Work with SKU Cross Reference Screen (Selecting an Offer)

Purpose: Use this screen to identify the offer for which you wish to define a cross reference between item and SKU codes in Order Administration and another system.

How to display this screen: Enter *MSKR* in the Fast path field at the top of any menu or select Maintain SKU Cross Reference from a menu.

Field	Description
Offer	A unique code for the catalog, space, or advertisement for which you wish to define a cross reference between an Order Administration item and SKU and another system's item and SKU. Enter a valid offer code to advance to the *Maintain SKU Cross Reference Screen*. **ChannelAdvisor:** To work with cross-references for the ChannelAdvisor integration, enter the offer code specified in the *ChannelAdvisor SKU X-Ref Offer (L92)* system control value. Alphanumeric, 3 positions; required.

Maintain SKU Cross Reference Screen

Purpose: Use this screen to create, change, and delete SKU cross reference codes for Order Administration items and SKUs. SKU cross reference codes represent the code for an item and SKU as represented in another system.

How to display this screen: Enter an offer code on the *Work with SKU Cross Reference Screen (Selecting an Offer)*.

Field	Description
Offer	The code and description of the catalog, space, or advertisement for which you wish to create SKU cross reference numbers. The system displays all existing Order Administration items and SKUs, regardless of whether the item or SKU is associated with this offer. Offer code: Alphanumeric, 3 positions; display-only. Offer description: Alphanumeric, 30 positions; display-only.
Item/desc (Item number/Item description)	The item code for which you wish to create a SKU cross reference number. The description of the item is listed below the item code. Item number: Alphanumeric, 12 positions; optional. Item description: Alphanumeric, 120 positions; optional.
Colo, styl, size	The first, second, and third SKU elements defined for an item in your company.nAlphanumeric, three 4-position fields; optional.
SKU description	The SKU description. Alphanumeric, 40 positions; optional.

Field	Description
SKU cross reference	A code for an item and SKU as represented on another system. **Note:** To use a SKU cross reference in order entry, you cannot have the code exceed 12 positions. Alphanumeric, 40 positions; optional.

Create SKU Cross Reference Codes

To create: Scan for the item and SKU for which you wish to create a SKU cross reference code, using the scan fields at the top of the screen. Enter a cross reference code in the SKU cross reference field next to the item and SKU you wish to update.

The system positions the cursor to the first scan field so that you can scan for the next item and SKU you wish to update.

Change SKU Cross Reference Codes

To change: Scan for the item and SKU for which you wish to change the SKU cross reference code, using the scan fields at the top of the screen. Enter the change you wish to make to the existing cross reference code in the SKU cross reference field next to the item and SKU you wish to update.

The system positions the cursor to the first scan field so that you can scan for the next item and SKU you wish to update.

Updating SKU Offer Prices (MUSK)

Purpose: Use the Update SKU/Offer screen to create or update a SKU/offer price for specific SKUs of an item.

You might want to use this menu option instead of maintaining SKU/offer prices through Work with Item/SKUs, if your company contains items with many SKUs and you want to update multiple SKUs for multiple offers at one time.

The SKU/Offer price information you can update for a SKU'ed item is:

- effective date
- price quantity
- price of the SKU in the offer
- associate price of the SKU in the offer
- special handling flag
- special handling price
- special handling code
- tax inclusive price of the SKU in the offer
- tax inclusive associate price of the SKU in the offer

You can define SKU/offer prices for up to 10 offers at one time.

Number assignment: The SKU Quick Price Update Number number assignment allows more than one user to enter SKU/offer prices at one time. When a user creates a SKU/offer price, the system assigns the SKU/offer price the next number available for this number assignment. See *Setting Up the Number Assignment Table (WNUM)*.

If the item/offer exists: The system creates a SKU/offer using the item/offer information, except for the information you defined for the SKU/offer price.

If the item/offer does not exist: The system creates a SKU/offer using the following information:

- the *Gift Wrap Default (F07)* system control value defaults to the Gift order field.
- the system defaults the Sale item field to *unselected*.
- the system defaults the Volume discount field to *unselected*.
- the system defaults the Column pricing field to *unselected*.
- the information you defined for the SKU/offer price

The system leaves any remaining fields blank.

In this topic:

- *Update SKU/Offer Screen*
- *Exclude SKU Offer Prices Screen*

Update SKU/Offer Screen

Use this screen to create or update a SKU/offer price for specific SKUs of an item.

Defaulting active offers: If the *Default Active Offers (J07)* system control value is selected and you do not manually enter an offer in the Offer fields, the system defaults the 10 most recent active offers to the Offer field for the entered SKU'ed item: `Offers have been defaulted - click OK to update`.

The offers default to the Offer fields in descending Start date sequence.

> **Note:**
>
> The system does not default any offers until you enter a SKU'ed item, effective date, quantity, and price, and select *OK*.

You must enter a SKU'ed item on the *Update SKU/Offer Screen*; however, you cannot enter a SKU code. Because of this, the system always defaults the 10 most recent *item offers* to the Offer fields.

- If the item is not assigned to 10 active item offers, the system defaults the available active offers assigned to the item. For example, if the item is assigned to 25 item offers, but only 8 item offers are active, the system defaults the 8 active item offers.
- If the item is assigned to more than 20 active item offers, the system evaluates the offer's Start date to determine the 20 most recent active item offers to default.

- If active offers do not exist for the item, the Offer fields remain blank and you must manually enter offers in the Offer fields.
- If you update the Item and/or SKU field, the system will not update the defaulted offers.
- You can manually change a defaulted offer to another offer, even if the offer is a future offer or expired offer.

How to display this screen: Enter *MUSK* in the Fast path field at the top of any menu or select Update SKU Offer Prices from a menu.

Field	Description
Item	A user defined code that represents an item. This is the item for which you wish to create or update SKU/offer prices. An error message indicates if you enter a non-SKU'ed item in this field: `Invalid item - Item must be SKU'ed.` An error message indicates if you enter an item that is not associated with an item/offer: `Invalid item - Item/Offer must exist.` Item codes are defined in and validated against the Item table. Alphanumeric, 12 positions; required.
Description	A description of the item. Updates when you enter an item code in the Item field. Alphanumeric, 120 positions; display-only.
Effective date	The date the price or quantity break discount becomes valid. This date should be on or after the effective date of the offer. If there are multiple effective dates for the same SKU/offer, the system uses the price associated with the effective date closest to, but not greater than, the order date. *Example:* If there are effective dates of Feb. 20 and Mar. 31 and the customer placed an order on April 1, the customer receives the price associated with the effective date of March 31. Numeric, 6 positions (in user date format); optional.
Quantity	The amount of the item/SKU that the customer must order to receive the discounted (quantity break) price. Numeric, 7 positions; required.
Tax inclusive price	The price at which the item will be sold in the specified offer(s) on orders subject to tax-inclusive pricing and VAT. Included only if the *Tax Included in Price (E70)* system control value is *selected*. If so, the following message indicates if you do not define a price in this field: `Tax Inclusive Price is required entry.` Numeric, 13 positions with a 2-place decimal; optional.
Price	The price at which the item will be sold in the specified offer(s) when the quantity and effective date are met. Numeric, 13 positions with a 2-place decimal; required.
Associate price	The price at which the item will be sold in the specified offer(s) to associate customers. Included only if the *Tax Included in Price (E70)* system control value is *selected*. Numeric, 13 positions with a 2-place decimal; optional.

Field	Description
Tax inclusive associated price	The price at which the item will be sold in the specified offer(s) to associate customers on orders subject to tax-inclusive pricing and VAT. Numeric, 13 positions with a 2-place decimal; optional.
Spec. hand. (Special handling)	Indicates whether this item is eligible for any type of special handling in this offer, such as monogramming or hemming. Valid values are: *Selected* = This item is eligible for special handling. When you add this item to an order, you advance to another screen where you can enter special handling instructions. *Unselected* (default) = This item is not eligible for special handling.
S/H price (Special handling price)	The price to charge the customer for special handling. You can specify in the *Evaluate Special Handling Charges by Order Line (D67)* system control value whether to add the price just once for each order line, or multiply the special handling price by the item quantity for the line. An error message indicates if you define a special handling price and the Special handling field is *unselected*: `Special handling price not allowed when not eligible`. The following message indicates if you enter a special handling price and you defined a custom special handling code in the Special handling code field: `Special handling charge not allowed with custom format code`. Numeric, 13 positions with a 2-place decimal; optional.
S/H code (Special handling code)	The additional charge code associated with the type of special handling you are offering for the item. The special handling can be either standard or custom; the system handles each type in a different way. See *Establishing Additional Charge Codes (WADC)* and *Establishing Custom Special Handling Formats (WSHF)*. If you enter a special handling code here, you will advance to the *Work with Special Handling Screen* or *Work with Custom Special Handling Screen* automatically in order entry. Alphanumeric, 2 positions; optional.
SKU element 1	The name of SKU element 1, based on the *Split SKU Element Column 1 Heading (A34)* system control value. You can define up to 30 SKU element 1 codes for which you wish to create or update SKU/offer prices. You can leave the SKU element 1 fields blank if you wish to update all of the SKU element 1 codes for the item. Alphanumeric, thirty 4-position fields; optional.
SKU element 2	The name of SKU element 2, based on the Split SKU Element 2 Column Heading system control value. You can define up to 30 SKU element 2 codes for which you wish to create or update SKU/offer prices. You can leave the SKU element 2 fields blank if you wish to update all of the SKU element 2 codes for the item. Alphanumeric, thirty 4-position fields; optional.

Field	Description
SKU element 3	The name of SKU element 3, based on the Split SKU Element 3 Column Heading system control value. You can define up to 30 SKU element 3 codes for which you wish to create or update SKU/offer prices. You can leave the SKU element 3 fields blank if you wish to update all of the SKU element 3 codes for the item. Alphanumeric, thirty 4-position fields; optional.
Offers	The offers you wish to update with this SKU/offer price information. See *Working with Offers (WOFR)*. You can create or update SKU/offer prices for up to 10 different offers at one time. If the *Default Active Offers (J07)* system control value is selected and you do not manually enter an offer in the Offer fields, the system defaults the 10 most recent active offers to the Offer fields for the entered item. The offers default to the Offer fields in descending Start date sequence. An error message indicates if you enter the same offer in more than one field: `More than one offer A01 has been entered`. An error message indicates if you do not define at least one offer: `At least one (1) Offer must be entered`. Alphanumeric, 3 positions; required.

Instructions:

1. Complete each necessary field.
2. If you did not define specific SKU codes you wish to update, the system displays the following message: `Click OK to update ALL SKUs for Item`.
3. Select *OK* to update the SKU/offer price information, or select *Exit* to cancel.
4. If you selected *OK*, you advance to the *Exclude SKU Offer Prices Screen*, where you can exclude specific SKUs from being updated with this SKU/offer price.

Exclude SKU Offer Prices Screen

Purpose: Use this screen to exclude a specific SKU from being updated with the SKU/offer price you defined.

The system displays all of the valid SKU combinations for the item, based on the SKU codes you entered on the *Update SKU/Offer Screen*. For example, if you sell mittens in small, medium, and large and in many colors, but only defined the SKU small on the Update SKU/Offer screen, the system would show mittens only in size small in all of the available colors.

How to display this screen: Complete the *Update SKU/Offer Screen*.

Field	Description
Item	A user defined code that represents an item. This is the item for which you wish to create or update SKU/offer prices. Item codes are defined in and validated against the Item table. Alphanumeric, 12 positions; display-only.

Field	Description
Quantity	The amount of the item/SKU that the customer must order to receive the discounted (quantity break) price. Numeric, 7 positions; display-only.
Description	A description of the item. Alphanumeric, 120 positions; display-only.
Price	The price at which the item will be sold when the quantity and effective date are met. Numeric, 13 positions with a 2-place decimal; display-only.
Associate price	The price at which the item will be sold to associate customers. Numeric, 13 positions with a 2-place decimal; display-only.
Offers	The offers you selected on the *Update SKU/Offer Screen*. These are the offers for which you wish to create or update SKU/offer prices. Alphanumeric, 3 positions; display-only.
SKU elements	The name of SKU elements 1, 2 and 3, based on the *Split SKU Element Column 1 Heading (A34)* system control value. The system displays the valid SKU combinations that are eligible for a SKU/offer price update, based on the SKU codes you defined on the Update SKU/Offer screen. Alphanumeric, thirty 4-position fields; optional.
Exclude?	Indicates whether you wish to exclude the valid SKU combination from creating a SKU/offer price. Valid values are: *Selected* = Exclude this SKU combination from creating a SKU/offer price. *Unselected* = Do not exclude this SKU combination from creating a SKU/offer price.

Instructions:

1. *Select* the SKU combinations you wish to exclude from creating a SKU/offer price; otherwise, leave the field blank if you want to create a SKU/offer price for the SKU.
2. Select *Process* to create the SKU/offer prices, or select *Exit* to cancel.
3. The system returns you to the Update SKU/Offer screen.

You can view the SKU/Offer prices you created on the Work with SKU Prices screen in Work with Item/SKUs. See *Assigning Items/SKUs to Offers*.

> **Note:**
>
> If the effective date of the SKU/offer price you created matches the effective date of an existing SKU/offer price, the system replaces the existing SKU/offer price with the new SKU/offer price.

Maintaining Item/SKU/Offer (CPIM)

Purpose: Use Maintain Item/SKU/Offer to recalculate the projected units or update other information in the Item/Offer table.

In this topic:

- *Maintain Item/SKU/Offer Screen*

For more information: See *Working with Existing Items (MITM)* for a description of the fields on the Change Item, Change SKU, and Change SKU/Offer screens.

Maintain Item/SKU/Offer Screen

Purpose: Use this screen to update item/offer information.

How to display this screen: Enter *CPIM* in the Fast path field or select Maintain Item/SKU/Offer from a menu.

Field	Description
Offer	A code for the catalog, space, or television advertisement from which you accept orders. See *Working with Offers (WOFR)*. Alphanumeric, 3 positions; required.
Item	A code for a unit of inventory that you sell. Alphanumeric, 12 positions.
SKU	A code for the unique characteristics of the item, such as its color, size, width, etc. Alphanumeric, three 4-position fields.
Price	The price of a single unit of the item, as advertised in the offer. Numeric, 13 positions with a 2-place decimal; optional.
F/O (Feature/Option code)	This code identifies whether the item in the offer is considered a feature or option in a depiction (a photograph or drawing of the item along with other items). If, for example, a dining room is depicted, the featured item might be the dining room table, and the options might include a place setting, crystal, and a centerpiece. Valid values are: *Feature* = Item is the featured item in the depiction *Option* = Item is an option within a depiction Optional.
P/N (Pickup/New code)	This code identifies whether the item is a carryover from a previous offer or is an item that you are just beginning to sell. Valid values are: *Pickup* = Item is a pickup item from a previous offer *New* = Item is new to this offer Optional.
Tax inclusive price	The price of a single unit of the item, as advertised in the offer, on orders which are subject to VAT. Included only if the *Tax Included in Price (E70)* system control value is *selected*. Numeric, 13 positions with a 2-place decimal; optional.

Screen Option	Procedure
Update the base item	Select *Change* for the item you want to update to advance to the Change Item Screen. See *Performing Initial Item Entry (MITM)*.

Screen Option	Procedure
Update a SKU	Select *Change SKU* for the SKU'd item you want to update to advance to the Change SKU (First Screen). See *Performing Initial Item Entry (MITM)*
Update a SKU/Offer	Select *Change SKU offer* for the SKU/Offer you want to update to advance to the Change SKU/Offer Screen. See *Performing Initial Item Entry (MITM)*

Maintaining Item Offers (MIOF)

Purpose: Use Maintain Item Offers to update item offer information for a specific offer, or to change item information for a specific item.

For more information: See *Assigning Items/SKUs to Offers* for more information on changing item or item offer information.

Maintain Item/Offer Screen

How to display this screen: Enter *MIOF* in the Fast path field at the top of any menu or select Maintain Item Offers from a menu.

Field	Descriptionh
Offer	A code for a catalog, space, or television advertisement from which you accept orders. See *Working with Offers (WOFR)*. Alphanumeric, 3 positions; required.
Item	A code for a unit of inventory that you sell. Once you have selected an offer, you can scan on this field. Alphanumeric, 12 positions; optional.
SKUs?	Indicates whether the item contains SKUs. Valid values are: *Selected* = this item contains SKUs *Unselected* = this item does not contain SKUs
Price	The *Price* of a single unit of the item, as advertised in the offer. Numeric, 13 positions with a 2-place decimal; optional.
F/O (Feature/option code)	The *Feature/option* code identifies whether the item in the offer is considered a feature or option in a depiction (a photograph or drawing of the item with other items). If for example, a dining room is depicted, the feature item might be the dining room table and the options might include the place setting, crystal and centerpiece. Valid values are: *Feature* = this item is the featured item in the depiction *Option* = this item is an option in the depiction Optional.
P/N (Pickup/new code)	The *P/N (Pickup/new code)* code identifies whether this item is a carryover from a previous offer or is an item that you are just beginning to sell. Valid values are: *Pickup* = Item is a pickup item from a previous offer *New* = Item is new to your offer Optional.

Field	Descriptionh
Tax inclusive price	The *Tax inclusive price* of a single unit of the item, as advertised in the offer, on orders which are subject to VAT. Included only if the *Tax Included in Price (E70)* system control value is *selected*. Numeric, 13 positions with a 2-place decimal; optional.

Screen Option	Procedure
Change base item information	Select *Change* for an item to advance to the Change Item screen. See *Performing Initial Item Entry (MITM)*.
Change item offer information	Select *Change Item Offer* for an item to advance to the Change Item Offer screen. See *Performing Initial Item Entry (MITM)*.

Copying SKU/Offer Records (CSKO)

Purpose: Use this menu option to copy item/SKUs from one SKU offer to another SKU offer by selecting an offer to copy from and the new offer to be created to.

You can also copy all SKU offer records from one offer to another offer using the *Copying SKU Offer Information (MCSO)* menu option.

What SKU offer information is copied? When you copy a SKU offer record to a new offer, the system copies the following records for the from offer to create matching records for the to offer.

- SKU offer
- SKU price **Note:** The system copies the SKU price record for the from offer for a quantity of 1; the system does not copy any other SKU price records that exist for other quantities to the to offer.

Additionally, if you select to copy a SKU offer record for a non-SKU'd item, the system creates a SKU offer record and an item offer record for the to offer if an item offer already exists for the from offer.

Example: You select to copy items SKU202 RED SMLL and ITEM30 from offer 202 to offer 203.

Item/SKU copied	From offer	Records copied	To offer	Records created
SKU202 RED SMLL	202	SKU offer SKU price	203	SKU offer SKU price
ITEM301	202	SKU offer SKU price Item offer	203	SKU offer SKU price Item offer

Copy SKU/Offer Records Screen

This screen displays all SKU offer records that exist for the company you are currently in; you can select which SKU offer records you wish to copy to another offer.

To copy:

- Optionally, scan for the SKU offer records you wish to copy by entering an offer in the Copy from offer field and an item in the Item field.
- Next to each SKU offer record you wish to copy, enter the offer for which you wish to create a SKU offer record in the To offer field.
- Select *Accept*.

> **Note:**
>
> The system creates a SKU offer record for the to offer that matches the SKU offer record for the from offer. You can change the information for the to offer at the Change SKU Offer screen.

How to display this screen: Enter *CSKO* in the Fast path field or select Copy Individual SKU Offers from a menu.

Field	Description
Copy from offer	The offer from which you wish to copy SKU offer information. You can use this field to scan for the offer whose SKU offer records you wish to copy. **Note:** The system does not verify that the offer you enter in this scan field is a valid offer. Alphanumeric, 3 positions; optional.
From offer	The offer from which the information will be copied. Offer codes are defined in an validated against the Offer table; see *Working with Offers (WOFR)*. Alphanumeric, 3 positions; required.
Item	The item code and SKU whose SKU offer information you wish to copy. You can use this field to scan for the item and SKU whose SKU offer records you with to copy. **Note:** The system does not verify that the item and SKU you enter in this scan field is a valid item/SKU. Item code: Alphanumeric, 12 positions; optional. SKU code: Alphanumeric, three 4-position fields; optional.

Field	Description
To offer	The offer to which the information will be copied. **Note:** The system does not validate that the from offer is different from the to offer. Offer codes are defined in an validated against the Offer table; see *Working with Offers (WOFR)*. Alphanumeric, 3 positions; optional.

Screen Option	Procedure
Display SKU offer information for the From SKU offer record	Select *Display* for an offer to advance to the Display SKU Offer screen.
Toggle the display of the Options field	Select *Options on/off* to toggle the Options field on or off.
Copy the SKU offer records of the From offer to create SKU offer records for the To offer	Select *Accept*.

Maintaining Purchase Orders

Topics in this part:

- *Maintaining Purchase Orders (MPOE)* tells you how to select a purchase order for maintenance, enter any changes, and accept your entries.

Maintaining Purchase Orders (MPOE)

Purpose: This topic describes how to select a purchase order for maintenance, maintain header, detail, and all related information, and accept or reject your changes.

Drop ship POs: Creating a drop ship purchase order expedites the shipment of a drop ship order to the customer. The system performs the following procedures during drop ship processing:

- An item is flagged as “Drop Ship” in Order Entry (Open Drop Ship line).
- The system checks the Item/SKU table to determine the primary vendor assigned to the item/SKU that was ordered.
- The system then checks the Vendor table to determine whether this vendor creates drop ship purchase orders or drop ship pick slips. If drop ship POs are created for this vendor, PO Print automatically prints the Drop Ship PO.
- Once confirmation has been received from the vendor, PO Receipts closes the purchase order, closes the order, and generates a billing record for the customer.

Purchase Order Outbound API: You can use the Purchase Order Outbound API to pass purchase order information to download to another system, such as a warehouse management system (WMS) or EDI vendor system. See *Generic Outbound Purchase Order API* the Web Services Guide on My Oracle Support (ID 2953017.1) for overview and setup.

In this topic:

- *Work with PO Messages Screen*
- *Purchase Order Summary Screen*
- *Completing PO Maintenance*
- *Print P/O Window*

Related Secured Features

- *Override PO Cost (A17)*
- *Approve Purchase Order (A31)*
- *Maintain from within Inquiry (A16)*
- *Non-Inventory Entry (A09)*
- *Override Vendor's Discount Percentage (A10)*
- *Update Existing Vendor Notes (A14)*
- *Update Existing P/O Messages (A13)*

Selecting Purchase Orders for Maintenance

Overview: You advance to purchase order maintenance through the *MPOE* fast path, which brings you to the PO Maintenance Select Prompt Screen. From this screen, you can advance to:

- *Select Purchase Order by Due Date Screen*
- *Select P/O by Reference Number Screen*
- *Select Purchase Order by Vendor Number Screen*
- *Vendor Selection Pop-Up Window (Selecting Purchase Orders by Vendor Name)*
- *Select P/O by Vendor Reference Screen*
- *Select Purchase Order by Vendor Item Screen*
- *Select Purchase Order by Item/SKU Screen*
- *Select Purchase Order by Buyer Screen*

From any selection screen, *select* a purchase order to advance to the PO Maintenance - Maintain Detail Screen.

Maintaining multiple purchase orders: You can select multiple purchase orders for maintenance at any selection screen. When you select *Accept* or *Reject* after you finish maintaining a purchase order, you advance to the next purchase order you selected for maintenance.

PO Maintenance Select Prompt Screen

Use this screen to locate the purchase order number you wish to maintain.

How to display this screen: Enter *MPOE* in the Fast path field at the top of any menu.

Field	Description
PO #	Enter a valid purchase order number to advance to the *PO Maintenance - Maintain Detail Screen*. Numeric, 7 positions; optional.

Field	Description
Due Date	Enter a purchase order due date to advance to the *Select Purchase Order by Due Date Screen*. Numeric, 6 positions; optional.
Reference #	Enter a purchase order reference number to advance to the *Select P/O by Reference Number Screen*.
Vendor	Enter a vendor number to advance to the *Select Purchase Order by Vendor Number Screen*. Numeric, 7 positions; optional.
Vendor name	Enter a vendor name to advance to the *Vendor Selection Pop-Up Window (Selecting Purchase Orders by Vendor Name)*. Alphanumeric, 20 positions; optional.
Reference	Enter a vendor reference number to advance to the *Select P/O by Vendor Reference Screen*. Alphanumeric, 15 positions; optional.
Vendor Item	Enter a vendor item number to advance to the *Select Purchase Order by Vendor Item Screen*. Alphanumeric, 20 positions; optional.
Item/SKU	Enter a valid item/SKU to advance to the *Select Purchase Order by Item/SKU Screen*. Alphanumeric, 12 positions (for item), three 4-position fields (SKU); optional.
Buyer	Enter a buyer code to advance to the *Select Purchase Order by Buyer Screen*. Alphanumeric, 3 positions; optional.

Select Purchase Order by Due Date Screen

How to display this screen: At the *PO Maintenance Select Prompt Screen*, enter a purchase order due date.

You can also display this screen by entering a purchase order due date at the *Select Purchase Order for Inquiry Screen*; however, the screen options will differ.

Field	Description
Due date	The date the purchase order is due to be received. Numeric, 6 positions (in user date format); optional.
Promise date	The date the purchase order is scheduled to arrive, or to ship. This date is user-defined and its usage depends on your organization's procedures. Numeric, 6 positions (in user date format); optional.
P/O #	A unique number to identify a purchase order. Numeric, 7 positions; optional.
Balance	The value of the merchandise ordered on the purchase order. Calculated by multiplying the quantity ordered by the vendor's cost. This is the total cost for all the detail lines on the purchase order. The system updates this value. Numeric, 20 positions with a 4 place decimal.

Field	Description
Vendor	A code that defines the supplier of items. Numeric, 7 positions; optional.
Buyer	A code to identify a person authorized to make purchases. Alphanumeric, 3 positions; optional.
Status	The status of the purchase order. Status options: • Cancelled • Docked • Held • Open • Suspended • Closed Optional.

> **Note:**
>
> The Select by (field name) screens are the same in both purchase order maintenance and purchase order inquiry; however, the screen options differ.

Screen Option	Procedure
Select a purchase order for maintenance	*Select* a purchase order (if you advanced through PO maintenance) or Select *Change* for a purchase order (if you advanced through PO inquiry) to advance to the *PO Maintenance - Maintain Detail Screen*. **Maintaining multiple purchase orders:** You can select multiple purchase orders for maintenance. When you select *Accept* or *Reject* after you finish maintaining a purchase order, you advance to the next purchase order you selected for maintenance.
Select a purchase order for inquiry	*Select* a purchase order to advance to the First Display Purchase Order Detail Screen. **Note:** Available through PO inquiry only. **Reviewing multiple purchase orders:** You can select multiple for purchase orders for review. When you select *Exit* after you finish reviewing a purchase order, you advance to the next purchase order you selected for review.

Screen Option	Procedure
Copy a purchase order	Select *Copy* for a purchase order to copy an existing purchase order. See the *Copying Purchase Orders*. **Note:** This option is not available in purchase order inquiry.

Select P/O by Reference Number Screen

How to display this screen: At the *PO Maintenance Select Prompt Screen*, enter a purchase order reference number. You can also display this screen by entering a purchase order due date at the *Select Purchase Order for Inquiry Screen*; however, the screen options will differ.

> **Note:**
>
> The fields and options are similar to those described at the *Select Purchase Order by Due Date Screen*.

Select Purchase Order by Vendor Number Screen

How to display this screen: At the *PO Maintenance Select Prompt Screen*, enter a vendor number. You can also display this screen by entering a purchase order due date at the *Select Purchase Order for Inquiry Screen*; however, the screen options will differ.

> **Note:**
>
> The fields and options are similar to those described at the *Select Purchase Order by Due Date Screen*.

Vendor Selection Pop-Up Window (Selecting Purchase Orders by Vendor Name)

How to display this screen: Enter a vendor name at the *PO Maintenance Select Prompt Screen*. You can also display this screen by entering a purchase order due date at the *Select Purchase Order for Inquiry Screen*.

> **Note:**
>
> The fields and options are similar to those described at the *Select Purchase Order by Due Date Screen*.

Select P/O by Vendor Reference Screen

How to display this screen: At the *PO Maintenance Select Prompt Screen*, enter a vendor reference number. You can also display this screen by entering a purchase order due date at the *Select Purchase Order for Inquiry Screen*; however, the screen options will differ.

> **Note:**
>
> The fields and options are similar to those described at the *Select Purchase Order by Due Date Screen*.

Select Purchase Order by Vendor Item Screen

How to display this screen: At the *PO Maintenance Select Prompt Screen*, enter a vendor item number. You can also display this screen by entering a purchase order due date at the *Select Purchase Order for Inquiry Screen*; however, the screen options will differ.

> **Note:**
>
> The fields and options are similar to those described at the *Select Purchase Order by Due Date Screen*.

Select Purchase Order by Item/SKU Screen

How to display this screen: At the *PO Maintenance Select Prompt Screen*, enter an item/SKU code. You can also display this screen by entering a purchase order due date at the *Select Purchase Order for Inquiry Screen*; however, the screen options will differ.

> **Note:**
>
> The fields and options are similar to those described at the *Select Purchase Order by Due Date Screen*.

Select Purchase Order by Buyer Screen

How to display this screen: At the *PO Maintenance Select Prompt Screen*, enter a buyer code. You can also display this screen by entering a purchase order due date at the *Select Purchase Order for Inquiry Screen*; however, the screen options will differ.

> **Note:**
>
> The fields and options are similar to those described at the *Select Purchase Order by Due Date Screen*.

Copying Purchase Orders

Purpose: Use the Copy function to create an exact duplicate of an existing purchase order. You can copy a purchase order, regardless of the original purchase order's status. The system assigns an Open status to the new purchase order.

How to copy a purchase order:

1. At a Select Purchase Order screen, select *Copy* for the PO you want to copy. See *Selecting Purchase Orders for Maintenance*.
2. The system copies the PO and displays the *PO Maintenance - Maintain Detail Screen* for the new purchase order. The system automatically assigns a number to the new purchase order.

PO Maintenance - Maintain Detail Screen

Purpose: Use this screen to change, cancel, display, or add a line to an existing purchase order. Up to three purchase order lines display at one time; select *Next* to review additional lines.

How to display this screen:

1. Select the purchase order by number at the *PO Maintenance Select Prompt Screen*.
2. If you do not know the exact number, enter information in one of the selection fields at the *PO Maintenance Select Prompt Screen* to advance to a Select Purchase Order screen (see *Selecting Purchase Orders for Maintenance*). At this screen, *select* a PO.

Field	Description
Vendor	The code and name of the supplier. Alphanumeric, 20 positions; display-only.
PO #	The number assigned to the purchase order. Numeric, 7 positions; display-only.
Status	The status of the purchase order. Status options: • *Canceled* = The purchase order was canceled through PO Maintenance; it exists on the system for historical purposes. • *Docked* = You have received inventory associated with the purchase order, but have not yet confirmed items or quantities. • *Closed* = All lines on the purchase order have been received through PO Receiving. • *Held* = The PO must be approved through PO Maintenance before receipts can occur. • *Open* = The PO exists on the system awaiting PO Receipts. • *Suspended* = Inventory has been received into suspense through the PO Receiving function. Display-only.

Field	Description
Total cost	The total value of items to be purchased, calculated by the extended price (quantity ordered multiplied by price), plus additional estimated charges and line surcharges (minus any discounts). Expressed in your currency, not the vendor's. Numeric, 20 positions with a 4-place decimal; display-only.
Ln #	The purchase order detail line number. Up to 999 lines may exist on one purchase order. Enter a number in this field and select *OK* to position to a specific purchase order line number. Numeric, 3 positions; display-only.
Sts	The status of the purchase order line. Valid values: • *C* = Canceled • *H* = Held • *O* = Open • *S* = Suspended • *X* = Closed Alphanumeric, 1 position; display-only.
Item	A code representing an item on the purchase order. The description of the item is below this field. Enter a valid item number and select *OK* to position to a specific item. If more than one purchase order line contains the item, the purchase orders lines that contain the item display in line number sequence. Item: Alphanumeric, 12 positions; display-only. Description: Alphanumeric, 120 positions; display-only.
SKU	The SKU for the item on the purchase order line. Alphanumeric, three 4-position fields; display-only.
UOM (Unit of Measure)	The retailer’s unit of measure. This may differ from the vendor’s unit of measure. Typical units of measure include: • *EA* = each • *IN* = inches • *C12* = case of 12 Validated against the Unit of Measure table; see *Working with Units of Measure (WUOM)*. Alphanumeric, 3 positions; display-only.
Qty ord (Quantity ordered)	The number ordered of the item, in the retailer’s unit of measure. Numeric, 7 positions display-only.

Field	Description
Qty due (Quantity due)	The quantity remaining to be received. The system uses the following calculation to determine the quantity due: Order quantity from PO Detail table - Received quantity from PO Detail table = Quantity due. **Note:** 0 indicates the quantity received is greater than the quantity ordered.
Ext cost (Extended cost)	The extended cost of this PO detail line, which is calculated by multiplying the quantity ordered and the price from the purchase order, adding the surcharge, and subtracting the discount. Numeric, 20 positions with a 4-place decimal; display-only.

Screen Option	Procedure
Change PO detail information	Select *Change* for a detail line to advance to the PO Maintenance - Change PO Detail Screen. You cannot change a PO line that is in a cancelled or closed status: `Cannot change a closed/ cancelled PO line`.

Screen Option	Procedure
Cancel PO detail information	Select *Cancel* for a detail line to cancel it from the purchase order. The status (Sts field) for the item changes to *C* (canceled), and the On order qty reduces by the number of units canceled. **Note:** If the item is a drop ship item, and you use the Order Orchestration Drop Ship interface to process drop ship items for this vendor, you cannot cancel the PO from this screen unless: • You have authority to the Cancel OROB Drop Ship PO (J04) secured feature. • The item is a drop ship item, but was processed before the vendor was flagged as OROB Drop Shipping. If you do not have authority to the Cancel OROB Drop Ship PO (J04) secured feature, the following message displays when you select *Cancel* for an Order Orchestration drop ship line: `Use D/S Status option in PO or Order Inquiry to cancel D/S integration PO line` From PO Inquiry or standard Order Inquiry, you can cancel an Order Orchestration drop ship item if you have authority to the secured feature Order Maintenance Access (A22).
Display PO detail information	Select *Display* for a detail line to advance to the Display Purchase Order Detail Screen.

Screen Option	Procedure
Close the PO line	Select *Close* for a detail line to close it. The status (Sts field) for the item changes to *X* (closed), and the On order qty reduces by the number of units. **Note:** If the item is a drop ship item, and you use the Order Orchestration Drop Ship interface to process drop ship items for this vendor, you cannot close the PO from this screen. Instead, when you select *Close* next to an item the following message indicates: `Use D/S Status option in PO or Order Inquiry to cancel D/S integration PO line` From PO Inquiry or standard Order Inquiry, you can cancel an Order Orchestration drop ship item if you have authority to the secured feature *Order Maintenance Access (A22)*.
Work with estimated charges	Select *Estimated Charges* for a detail line to advance to the *Work with PO Detail Estimated Charges Screen*.
Display PO detail history	Select *History* for a detail line to advance to the *Display PO Detail History Screen*.
Update PO detail messages	Select *Messages* for a detail line to advance to the *Work with PO Detail Messages Screen*.
Review receiving history	Select *Receiving* for a detail line to advance to the *Purchase Receipts History Screen*.
Work with vendor item notes for the last item entered	Select *Vendor item notes* for a detail line to advance to the *Work with Vendor Item Notes Screen*.

Screen Option	Procedure
Approve PO	Select *Approve* to approve the PO. If you are not authorized to approve purchase orders, the screen displays an error message. The *Approve Purchase Order (A31)* secured feature controls this access. **Note:** If you advanced to this screen from PO inquiry, you cannot approve a purchase order. You need to select the purchase order in PO maintenance in order to approve it, regardless of your secured feature authority.
Create PO detail information	Select *Create Dtl* to advance to the *Create PO Detail Standard Screen*.
Work with PO header information	Select *Header* to advance to the *Work with Purchase Order (Header) Screen*. **Note:** If you change the buyer, ship via, offer, due date, cancel date, or promise date on the PO header, the system updates the value on each existing PO line in an open or held status. The system also updates the value for any new lines you add to the PO in PO Maintenance, unless you override the value at the detail level.
Accept the PO	Select *Accept* to accept the PO. See *Completing PO Maintenance*.

Screen Option	Procedure
Reject the PO	Select *Reject* to reject the PO. See *Completing PO Maintenance*.
Cancel the purchase order	Select *Cancel PO* to cancel this purchase order. If the PO is a drop ship PO and an authorization exists for the order, the system creates a record in the Void Auths table for the authorization amount. If a detail line on the PO is a drop ship item, and you use the Order Orchestration Drop Ship interface to process drop ship items, you cannot cancel the purchase order using this option, and the following message indicates: `Must cancel drop ship lines individually`
Work with vendor FOB for the PO	Select *FOB* to advance to the *Work with FOB for Purchase Order Screen*.
Add vendor notes	Select *Vendor notes* to advance to the *Work with Vendor Notes Screen*.
Display summary information	Select *Summary* to advance to the *Purchase Order Summary Screen*.
Display PO messages	Select *Messages* to advance to the *Work with PO Messages Screen*.

PO Maintenance - Change PO Detail Screen

Purpose: Use this screen to make changes to an item on a purchase order. You can also use this screen to:

- Break up shipments for a purchase order detail line or hold shipment of the entire line until a future date.
- Enter, display, update or delete estimated additional charges for brokerage, commission, duty, freight, import, surcharge, or other types of fees.
- Enter, display, update or delete estimated discounts for a purchase order detail line.

How to display this screen: At the *PO Maintenance - Maintain Detail Screen*, select *Change* for an item.

Field	Description
PO #	The number assigned to the purchase order. Numeric, 7 positions; display-only.

Field	Description
Status	The status of the purchase order. Status options: • *Canceled* = The purchase order was canceled through PO Maintenance; it exists on the system for historical purposes. • *Docked* = You have received inventory associated with the purchase order, but have not yet confirmed items or quantities. • *Closed* = All lines on the purchase order have been received through PO Receiving. • *Held* = The PO must be approved through PO Maintenance before receipts can occur. • *Open* = The PO exists on the system awaiting PO Receipts. • *Suspended* = Inventory has been received into suspense through the PO Receiving function. Display-only.
Vendor #	The code and name of the supplier. Alphanumeric, 20 positions; display-only.
Line #	The purchase order detail line number. Up to 999 lines may exist on one purchase order. Enter a number in this field and select *OK* to position to a specific purchase order line number. Numeric, 3 positions; display-only.
Status	The status of the purchase order line. Valid values: • *Open* = The PO line is open awaiting PO Receipts. • *Held* = The PO line is held. • *Cancelled* = The PO line was canceled through PO Maintenance; it exists on the system for historical purposes. • *Suspended* = Inventory has been received into suspense through the PO Receiving function. • *Closed* = The PO line has been received through PO Receiving. Alphanumeric; display-only.
Item	A code representing an item on the purchase order. The description of the item is below this field. Enter a valid item number and select *OK* to position to a specific item. If more than one purchase order line contains the item, the purchase order lines that contain the item display in line number sequence. Item: Alphanumeric, 12 positions; display-only. Description: Alphanumeric, 120 positions; display-only.
SKU	The SKU for the item on the purchase order line. Alphanumeric, three 4-position fields; display-only.

Field	Description
Qty	Quantity of the item that you have ordered from the vendor, in retailer's unit of measure. The system checks: • Minimum quantity in the Vendor/Item table (in retailer's unit of measure) • Order multiple in Vendor/Item table. (in retailer's unit of measure) An error message indicates if the quantity you order is less than the minimum, if the quantity is not a multiple of the quantity specified for the vendor/item, or if the quantity you enter cannot be converted to the vendor's unit of measure. See *Working with Vendor Items (WVNI)*. Numeric, 7 positions; optional.
Cost	The unit price you pay the vendor for this item, per retailer's unit of measure. If you do not enter a cost here, it defaults after you select *OK* as follows: • Vendor/Item cost • Standard cost from the SKU table The *Override PO Cost (A17)* secured feature controls access to this field. **Note:** You cannot change the cost of an existing purchase order line to zero, even if the vendor/item price and price from the SKU table are zero. **Order Orchestration PO Changes** When you change the cost for a drop ship purchase order line which has been sent to the *Order Orchestration Drop Ship Integration* for processing, Order Administration automatically sends the changed cost information to Order Orchestration, where the cost on the purchase order line updates automatically. Numeric, 13 positions with a 4-place decimal; required.
Transit qty	The quantity that the vendor has indicated is in transit from them to you. This is merchandise that has not been received as yet; however, it has been shipped from the vendor. You can update this quantity through *Working with P/O In Transit Information (MPIT)* or enter it here. Numeric, 7 positions; optional.
Primary disc (Primary discount percentage)	The primary discount percentage defined for this vendor that is applied to all items purchased. The primary discount is established in the Vendor record. May be overridden at the line level or using PO Header Overrides; see *Purchase Order Overrides Pop-Up Window*. Numeric, 5 positions with a 2-place decimal; optional.

Field	Description
Surcharge	An additional fee to purchase this item from this vendor. A surcharge is typically added to purchases from a broker. The surcharge is defined in the Vendor record. May be overridden using PO Header Overrides; see *Purchase Order Overrides Pop-Up Window*. Numeric, 13 positions with a 4-place decimal; optional.
Ext cost (Extended cost)	The extended cost of this PO detail line, calculated by multiplying the quantity ordered and the price, adding the surcharge, and subtracting the discount. Numeric, 13 positions with a 4-place decimal; display-only.
Vendor's	The vendor's item number, as defined in the Vendor/Item table; see *Working with Vendor Items (WVNI)*. Alphanumeric, 20 positions; display-only.
U/M (Unit of measure)	The vendor's unit of measure for the vendor's item. This typically describes how the item is ordered from the vendor. See *Working with Units of Measure (WUOM)*. Alphanumeric, 3 positions; optional.
Quantity	The quantity of the item you have ordered from the vendor. This quantity is expressed in the vendor's unit of measure and may be different than the Qty field, above. For example, if your unit of measure is “eaches” and the vendor's unit of measure is cases of 24, if the Qty field is set to 48 units, the Quantity field would be 2 (representing the vendor's unit of measure). Numeric, 7 positions; optional.
Vendor price	The price the vendor charges for the item, per vendor’s unit of measure. Expressed in the vendor's currency. Numeric, 13 positions with a 4-place decimal; optional.
Vnd Dscnt (Vendor discount)	The vendor's primary discount, applied to all items purchased. May be overridden at the line level or using PO Header Overrides; see *Purchase Order Overrides Pop-Up Window*. Numeric, 13 positions with a 2-place decimal; optional.
Ext price (Extended price)	The extended price of this PO detail line. Calculated by multiplying the price by the quantity ordered. Numeric, 20 positions with a 4-place decimal; display-only.
Buyer	A code that identifies a person who is authorized to make purchases for your company; see *Working with Buyers (WBUY)*. Alphanumeric, 3 positions; optional.
Ship via	A code that represents a carrier used for shipping merchandise to your company; see *Working with Purchase Order Ship Via (WPSV)*. Numeric, 2 positions; optional.
Offer (Offer code)	The code for the offer (catalog). See *Working with Offers (WOFR)*. Alphanumeric, 3 positions; optional.

Field	Description
Warehouse	A code that represents the warehouse where the item will be received. Validated against the Warehouse table; see *Creating and Maintaining Warehouses (WWHS)*. You can change the warehouse on a PO line only to a warehouse where the item currently exists. Numeric, 3 positions; optional.
Due date	The date the purchase order is due to be received, based on the PO date and the Lead days from the Vendor/Item record, or manually entered for the PO. This date is listed in Order Entry, Order Maintenance, and standard or streamlined Order Inquiry. **Note:** Changing the date on the PO detail line does not change the date on the PO header. You must also change the header date. Numeric, 6 positions (in user date format); optional.
Cancel date	The date the purchase order will be marked for cancellation if the order is not received. If you complete this field, you advance to the *PO Auto Cancel Date Selection Pop-Up Window*; from this window, you can generate the *Purchase Order Auto Cancel Report*. **Note:** Changing the date on the PO detail line does not change the date on the PO header. You must also change the header date. Numeric, 6 positions (in user date format); optional.
Promise date	A user-defined date that may be used to represent the expected ship date or promised arrival date. **Note:** Changing the date on the PO detail line does not change the date on the PO header. You must also change the header date. Numeric, 6 positions (in user date format); optional.

Screen Option	Procedure
Work with purchase order line discounts	Select *Discounts* to advance to the *Purchase Order Line Discount Screen*.
Work with estimated charges	Select *Estimated Charges* to advance to the *Work with PO Detail Estimated Charges Screen*.
Work with vendor item notes for the last item entered.	Select *Vendor Item Notes* to advance to the *Work with Vendor Item Notes Screen*.
Display PO messages	Select *Messages* to advance to the *Work with PO Detail Messages Screen*.
Update the SKU cost	Select *Update SKU Cost* to advance to the *Update SKU Cost Window*. An error message displays if all of the lines on the PO are cancelled or closed: `No lines available for cost update`.

Display Purchase Order Detail Screen

Purpose: Use this screen to review information about an item on a purchase order.

How to display this screen: From the *Create PO Detail Standard Screen*, select *Display* for a detail line. You can also display this screen by selecting *Display* for an item at the *PO Maintenance - Maintain Detail Screen*.

See *Second Display Purchase Order Detail Screen* for field descriptions.

Work with PO Detail Estimated Charges Screen

Purpose: Use this screen to create or change a charge for a specific purchase order detail line.

You can define the following types of estimated charges for a purchase order header or detail line:

- freight
- brokerage
- commission
- duty
- import
- prep
- royalty
- surcharge
- other fees

In purchase order maintenance, you can enter the estimated charge as a unit cost or a percentage. You enter the actual charges (for freight, brokerage, etc.) for the detail line at purchase order receiving. These charges are not reflected in the extended price of the purchase order.

Changing a purchase order estimated charge in purchase order maintenance generates a purchase order history message indicating that the charge has been changed.

Purchase order additional charge codes are defined through *Working With PO Additional Charges (WPAC)*.

Any charges that you already entered on the *Work with PO Header Estimated Charges Screen* display on the screen. If the *Default Vendor Item Additional Charges (I21)* system control value is *selected*, any charges defined for the item in Work with Vendor Items display on the screen.

> **Note:**
>
> If you enter a charge for a detail line and then enter the same charge on the header screen, the system overrides the amount you had defined for the line to the header amount.

How to display this screen:

1. At the *Create PO Detail Standard Screen*, other detail entry screen or the *PO Maintenance - Change PO Detail Screen* select *Est. Charges*. This screen displays for the last PO line entered.
2. At the *PO Maintenance - Maintain Detail Screen*, select *Estimated Charges* for a detail line.

Field descriptions: The Line #, Status, Item, SKU, and Item description fields on this screen are described below. See *Work with PO Header Estimated Charges Screen* for a description of the other fields on this screen.

Field	Description
Line #	The number for the purchase order detail line for which you are creating or changing additional estimated charges. Numeric, 3 positions; display-only.
Status	The status of the purchase order line. Alphanumeric, 1 position; display-only.
Item	The code for the item on the purchase order detail line. Alphanumeric, 12 positions; display-only.
SKU (Unlabeled field to the right of the Item)	The code that represents the special characteristics of the item, such as color or size. Alphanumeric, three 4-position fields; display-only.
Item description (Unlabeled field below the Item)	The description of the item on the purchase order detail line. Alphanumeric, 120 positions; display-only.

Screen Option	Procedure
Toggle between add mode and change mode	Select *Add/Change*. The existing charges on the screen display as display-only or they are enterable fields. Complete the necessary fields.

Display PO Detail History Screen

Purpose: Use this screen to review any activity against the purchase order line since it was created on the system. The system notes each time the line is maintained.

How to display this screen: At the *PO Maintenance - Maintain Detail Screen* or the *First Display Purchase Order Detail Screen* in PO inquiry, select *History* for an item.

Field	Description
Vendor #	The name and number of the supplier. Alphanumeric, 20 positions; display-only.
PO #	A unique number to identify the purchase order. Numeric, 7 positions; display-only.
Ln #	The number of this line on the purchase order. Numeric, 3 positions, display-only.
Item	A code that identifies a unit of inventory. Alphanumeric, 12 positions; display-only.
B/A	A code indicating whether the history represents a before or after image of the transaction. Values are: • *Before* = information representing the purchase order detail line before the transaction was processed. • *After* = information representing the purchase order detail line after the transaction was processed. Alphanumeric, 1 position; display-only.
Date	The date when the activity was performed. Numeric, 6 positions; display-only.
User	The user who performed the activity. Alphanumeric, 10 positions; display-only.
Description	A description of the activity that was performed against the purchase order detail line. Alphanumeric, 25 positions; display-only.

Work with PO Detail Messages Screen

Purpose: Use this screen to enter or update message text. These messages can print on the purchase order detail line if your print program supports it. Line messages relate to a single item on the purchase order only.

How to display this screen:

- At the *Create PO Detail Standard Screen*, other detail entry screen, or the *PO Maintenance - Change PO Detail Screen*, select *Messages*. The PO detail messages will be displayed for the last PO line entered.
- At the *PO Maintenance - Maintain Detail Screen* in PO maintenance, select *Messages* for a detail line.
- At the *First Display Purchase Order Detail Screen* in PO inquiry, select *Messages* for an item.
- At the *Second Display Purchase Order Detail Screen* in PO inquiry, select *Messages*.

Field	Description
Message	Free-form message about the item. Alphanumeric, 60 positions (each line); optional.

Field	Description
Print	Valid values are: • *Print on PO* • Blank (Do not print) Optional.

Screen Option	Procedure
Add/Change hold and release information	Select *Add/Change* to activate the add or change function, and enter the required information.

Purchase Receipts History Screen

Purpose: Use this screen to review receipt totals for an item on a purchase order.

How to display this screen: At the *PO Maintenance - Maintain Detail Screen* or the *First Display Purchase Order Detail Screen* in purchase order inquiry, select *Receiving* for an item.

Field	Description
P/O #	A unique number to identify the purchase order. Numeric, 7 positions; display-only.
Vendor	A unique number to identify the vendor. The description appears to the right. Validated against the Vendor table; see *Working with Vendors (WVEN)*. Vendor number: numeric, 7 positions; display-only. Description: alphanumeric, 20 positions; display-only.
Line #	The purchase order detail line number. Numeric, 3 positions; display-only.
Item	A code to represent the item on the purchase order. The description appears to the right. Item: alphanumeric, 12 positions; display-only. Description: alphanumeric, 120 positions; display-only.
SKU Qty Rcv (Quantity received)	The number of units received, presented in your unit of measure. Numeric, 7 positions; display-only.
SKU U/M (Unit of measure)	A standard by which an item is sold. Typical units of measure include: • *EA* = each • *IN* = inches • *C12* = case of 12 Validated against the Unit of Measure table; see *Working with Units of Measure (WUOM)*. Alphanumeric, 3 positions; display-only.
Vendor Qty Rcv (Quantity received)	The number of units received, presented in the vendor's unit of measure. Numeric, 7 positions; display-only.

Field	Description
Vendor U/M (Unit of measure)	The vendor's unit of measure. Alphanumeric, 3 positions; display-only.
Date received	The date the units were received at your warehouse. Numeric, 6 positions; display-only.
Cost at recp (Cost at receipt)	The unit cost of the item. Numeric, 13 positions with a 4-place decimal; display-only.
Date A/P	Not implemented. Numeric, 6 positions; display-only
Cost A/P	Not implemented. Numeric, 20 positions with a 4-place decimal; display-only.

Work with Vendor Item Notes Screen

Purpose: Use this screen to display, add, or change free-form notes about a vendor's item. Also, you can indicate whether to print each line of message text on purchase orders. These notes are displayed at PO Inquiry/Maintenance and Receiving.

How to display this screen:

- At the *Create PO Detail Standard Screen* other detail entry screen, or the *PO Maintenance - Change PO Detail Screen*, select *Vend Itm Notes*. The vendor notes will be displayed for the last PO line entered.
- At the *PO Maintenance - Maintain Detail Screen* in PO maintenance, select *Vendor item notes* for a detail line.
- At the *First Display Purchase Order Detail Screen* in PO inquiry, select *Vendor Item Notes* for an item.
- At the *Second Display Purchase Order Detail Screen* in PO inquiry, select *Notes*.
- At the *Work with Vendor Item Screen*, select *Vendor Item Notes* for an item

Field	Description
Note	Free-form text about the item and/or vendor. The text may print on purchase orders. Select *Next* to display additional lines. These notes are displayed at Purchase Order Inquiry (MPOI), *Maintaining Purchase Orders (MPOE)*, and Purchase Order Receipts. Alphanumeric, 60 positions (each line); optional.
Print	Valid values are: • *Print on PO* • *Do not print* Optional.

Screen Option	Procedure
Add/Change vendor item notes	Select *Add/Change* to activate the add or change function and update the required information.

Create PO Detail Standard Screen

Purpose: Use this screen to add a new item to a purchase order.

How to display this screen: At the *PO Maintenance - Maintain Detail Screen*, select *Create Dtl* for an item.

Purpose: Use this screen to add an item to the purchase order (top half of the screen) and for *Reviewing the Previous Purchase Order Detail Line* (bottom half of the screen).

Certain information defaults from the *Work with Purchase Order (Header) Screen*, including the PO number, revision number, status, and vendor number. You can override this information for a detail line. The bottom half of the screen is updated by the system and cannot be changed.

Field descriptions: The entry fields are described here. See *Reviewing the Previous Purchase Order Detail Line* for the remaining fields on this screen and for screen options.

Field	Description
P/O#	The number assigned to a purchase order is brought over from the PO Header screen and cannot be changed. Numeric, 7 positions; display-only.
Revision #	The number of times a purchase order has been revised. The revision number is increased each time the PO is maintained and accepted (*Accept*). When you initially create a purchase order, the revision number is 0. Numeric, 3 positions; display-only.
Status	The status of the purchase order. When you first create a PO, the status will be Open (blank) or Suspended. Status options: • *Canceled* = The purchase order was canceled through PO Maintenance; it remains on the system for historical purposes. • *Closed* = All lines on the purchase order have been received through PO Receiving. • *Held* = The PO must be approved through PO Maintenance before receipts can occur. • *Open* (blank) = The PO is awaiting PO Receipts. • *Suspended* = Inventory has been received into suspense through the PO Receiving function. Alphanumeric, display-only.
Total cost	A running total of the detail lines on the purchase order. The system sums the Extended cost of each detail line to display as the total cost of the purchase order. Numeric, 20 positions with a 4-place decimal; updated by the system.
Vendor #	The code that identifies the vendor or supplier of an item. Numeric, 7 positions; display-only.

Field	Description
Line #	The purchase order line number. Enables you to insert a line while creating the purchase order. *Example:* If you just added line 9, but realized that you forgot line 7, you can enter 7 in the line number field and type the item and quantity associated with this line. The system inserts line 7 and renumbers the remaining lines. **Note:** Select *P/O Detail Msg* to make sure the new line has been inserted properly. There can be up to 999 lines on one purchase order; if you try to enter more than 999 lines on a purchase order, the system displays an error message: `PO cannot exceed 999 lines`. Numeric, 3 positions; optional.
Item/Colr Size Othr	The item (and if applicable, SKU) being ordered. Must be a valid item/SKU, in retailer's item code (not vendor item code). To advance to the *SKU Scan Screen (PO Maintenance)*, complete just the item code. Item: alphanumeric, 12 positions; required. SKU: alphanumeric, three 4-position fields; required if the item has SKUs.
Quantity	The quantity of the item (in retailer's unit of measure) being ordered from the vendor. The system checks the minimum quantity and order multiple for the vendor/item, and displays an error message if the quantity you enter is too low or does not match. The following message indicates if you do not enter a quantity for a SKUed item and the *Quantity Required for Purchase Order SKU Scanning (F15)* system control value is *selected*: `Order quantity must be entered`. Numeric, 7 positions; required for non-SKUed items.
Cost	The unit price you pay the vendor for this item. If you do not enter a cost here, it defaults after you select *OK* as follows: • Vendor/Item cost • Standard cost from the SKU table If you do not enter a cost and the system does not find one using the hierarchy described above, a pop-up window opens requiring you to confirm entry of the item at a zero price. Select *OK* if the price should be zero, or select *Exit* to cancel and enter a price for the item. The *Override PO Cost (A17)* secured feature controls access to this field. Numeric, 13 positions with a 4-place decimal; required.

Field	Description
Primary disc (Primary discount)	The primary dollar discount amount to apply. If you do not specify a discount here, but there is a primary discount percentage defined for the vendor in the *Discount % (Primary discount percentage)* field, the system calculates and applies this discount as the primary. For example, the Discount % specified for the vendor is 15.00%, the unit price is $10.00, and you do not specify a Primary discount at this screen. In this situation, the system calculates a unit discount of $1.50 and applies it as the primary discount. However, in the same situation, if you entered a Primary discount of $1.75, the system applies this unit discount amount as the primary discount. Any other discounts from the Vendor Discount table apply after the primary discount has been calculated. See *Working with Vendors (WVEN)*.
Primary Discount Overrides	**Primary Discount Overrides** If you enter a primary discount override at the *Purchase Order Overrides Pop-Up Window*, the system applies the override to PO lines whose primary discount defaulted from the Vendor table. However, if you manually entered a primary discount using this field, the system does not update the primary discount with the override and instead retains the primary discount you manually defined. See *Overriding Discounts*. Numeric, 5 positions with a 2-place decimal; optional.
Buyer	A code that identifies a person who is authorized to make purchases for your company. The buyer you entered on the purchase order header defaults here, but you can override it. Validated against the Buyer table; see *Working with Buyers (WBUY)*. Alphanumeric, 3 positions; required.
Warehouse	A code that represents the warehouse where the merchandise will be received. On order quantity is increased in this warehouse. The warehouse from the purchase order header defaults, but you can override it. Validated against the Warehouse table. See *Creating and Maintaining Warehouses (WWHS)*. Numeric, 3 positions; required.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Ship via</td><td>A code that represents a carrier used for shipping merchandise to your company. This code is validated against the PO Ship Via table. See Working with Purchase Order Ship Via (WPSV). These shippers are defined separately from, and may differ from, those who deliver merchandise to your customers.
Ship Via Hierarchy
Each detail line on the purchase order requires a ship via code.
If you have defined a PO ship via for the vendor/item, the system defaults this ship via to the detail line.
If you enter a ship via code on the PO header, the system defaults this ship via to the detail lines that do not have a PO ship via defined for the vendor/item.
If a PO ship via is not defined for the vendor/item and you do not enter a ship via code on the PO header, you will need to enter a ship via code for each detail line on the purchase order.
Note:
If you enter PO lines and then change the ship via on the PO Header, the system defaults the new ship via to all of the lines on the PO, regardless of how the ship via originally defaulted to the line.
Numeric, 2 positions; required.</td></tr>
<tr><td>Due date</td><td>The date the PO is due to be received, based on the PO date and the Lead days defined for the Vendor/Item, or manually entered here. This date is indicated in Order Entry, Order Maintenance, and standard and streamlined Order Inquiry.
Numeric, 6 positions (in user date format); required.</td></tr>
<tr><td>Cancel date</td><td>The date the purchase order will be marked for cancellation if the order is not received. See Printing the PO Auto Cancel Report (MPAC).
Numeric, 6 positions (in user date format); optional.</td></tr>
<tr><td>Promise date</td><td>You can use this date to represent the expected ship date or promised arrival date.
Numeric, 6 positions (in user date format); optional.</td></tr>
<tr><td>Offer</td><td>The code for the offer (catalog). See Working with Offers (WOFR). The system creates a SKU/Offer record for this item if one does not already exist.
Alphanumeric, 3 positions; may be required (based on the System Control table value).</td></tr>
</table>

Completing this screen: If you enter a purchase order detail line for a SKUed item, you advance to the *SKU Scan Screen (PO Maintenance)*. Otherwise, the information you entered is in the bottom half of the Create PO Detail Standard screen. See *Reviewing the Previous Purchase Order Detail Line*.

SKU Scan Screen (PO Maintenance)

Purpose: Use this screen to create a purchase order detail line for each SKU of the item you entered on the *Create PO Detail Standard Screen*.

Screen sort: SKUs sort on this screen alphanumerically by the SKU sort sequence number assigned to each SKU. SKUs that are not assigned a SKU sort sequence number display at the top of the list and are sorted alphanumerically by SKU code. See *SKU Sort Sequence Numbers* for an overview.

How to display this screen: Enter an item containing SKUs in the Item field on the *Create PO Detail Standard Screen*.

Field	Description
P/O#	The number assigned to the purchase order, brought over from the PO Header screen. Numeric, 7 positions; display-only.
Item	The item being ordered. The item defaults from the *Create PO Detail Standard Screen*. Alphanumeric, 12 positions; display-only.
Item description (Unlabeled field below the Item)	The description of the item being ordered. Alphanumeric, 120 positions; display-only.
Discount (Purchase order discount labels)	The purchase order discount labels for discounts from the Vendor Discount table. Purchase order discount labels are from the Discount Field 1, 2, 3 system control values. See *Setting Up Purchase Order Values*. Alphanumeric, 10 positions; display-only.
Pct (Percent discount)	The percentage the system applies against the unit cost of an item/SKU on the purchase order. Percentage discounts are defined in and validated against the Vendor Discount table (Discount in Work with Vendors). The system calculates percentage discounts based on the method from the Discount calculation method field in the Vendor Extended table. See *Change Vendor Extended Screen*. Numeric, 11 positions with a 4-place decimal; display-only.
Unit disc (Unit discount)	The amount the system subtracts from the unit cost of an item/SKU on the purchase order. Unit discounts are defined in and validated against the Vendor Discount table (Discount in Work with Vendors). The system calculates unit discounts based on the method from the Discount calculation method field in the Vendor Extended table. See *Change Vendor Extended Screen*. Numeric, 13 positions with a 4-place decimal; display-only.
Vend disc (Vendor discount)	The unit discount amount, displayed in the vendor's unit of measure and currency. Numeric, 13 positions with a 4-place decimal; display-only.

Field	Description
Order qty (Order quantity)	The quantity (in retailer's unit of measure) from the Quantity field on the *Create PO Detail Standard Screen*. The system sums the quantity you enter for each SKU and requires that the total equal the quantity from this field. The following error message indicates if the value in the Quantity entered field does not match this total: `Sum of order quantities entered does not equal total order quantity.` You can select *Change Order Quantity* to override the quantity in this field if you want to match the total quantity entered for the SKUs. Not displayed if you did not enter a quantity on the Create Purchase Order Detail Standard screen. Numeric, 7 positions; display-only.
Qty entered (Quantity entered)	The total quantity ordered (in retailer's unit of measure) for all of the SKUs for this item. The system updates this field each time you enter a quantity for a SKU. The following error message indicates if the value in the Order quantity field does not match this total: Sum of order quantities entered does not equal total order quantity. Numeric, 7 positions; display-only.
Colr size other	The SKUs for the item you are ordering. Enter a valid SKU to display SKUs that match your entry. Alphanumeric, three 4-position fields; optional.
Description (SKU description)	The description of the item's SKUs. Alphanumeric, 20 positions; display-only.
Qty (Order quantity)	The quantity (in retailer's unit of measure) of each SKU that you wish to order. When you enter a quantity the system updates the quantity in the Quantity entered field. The following message indicates if you enter a quantity that is fewer than the minimum quantity for the vendor item (fast path = *WVNI*): `Minimum order quantity is 12.` The following message indicates if you enter a quantity that cannot be divided by the unit of measure for the vendor item (fast path = *WVNI*): `Order qty must be able to divide evenly by vendor UOM.` The following message indicates if you enter a quantity that is not a multiple of the order multiple (in retailer's unit of measure) for the vendor item (fast path = *WVNI*): `Vendor requires that Item is ordered in multiples of 10.` See *Working with Vendor Items (WVNI)*. Numeric, 7 positions; optional.

Field	Description
Cost	The unit price you pay the vendor for this item. If you do not enter a cost here, it defaults after you press *Enter* as follows: • cost entered at the *Create PO Detail Standard Screen*, if any • Vendor/Item cost • Standard cost from the SKU table If you do not enter a cost and the system does not find one using the hierarchy described above, a pop-up window opens requiring you to confirm entry of the item at a zero price. Select *OK* if the price should be zero, or select *Exit* to cancel and enter a price for the item. Numeric, 13 positions with a 4-place decimal; required if you entered a quantity.
Vendor item	The vendor item code. Vendor item codes are defined in Work with Vendor Items (fast path = *WVNI*); see *Working with Vendor Items (WVNI)*. Alphanumeric, 20 positions; display-only.
Vendor's qty (Vendor's quantity)	The SKU order quantity represented in the vendor's unit of measure. Displayed when you complete the Quantity field. Numeric, 7 positions; display-only.
Vendor's cost	The cost of the SKU represented in the vendor's currency. Displayed when you complete the Quantity field. Numeric, 13 positions with a 4-place decimal; display-only.

Screen Option	Procedure
Accept your entries	Select *Accept*. You return to the *Create PO Detail Standard Screen*, with the information you entered for each SKU displaying in the bottom half of the screen; see *Reviewing the Previous Purchase Order Detail Line*.
Reject your entries	Select *Reject*.
Change the percent or unit discounts for the SKUs defined on this screen	Select *Discounts* to advance to the *Purchase Order Line Discount Screen*.

Reviewing the Previous Purchase Order Detail Line

Purpose: After you enter an item at the *Create PO Detail Standard Screen*, information about that item appears in the bottom half of the screen.

Field	Description
Line #	The purchase order detail line number. You can enter up to 999 lines on one purchase order. Numeric, 3 positions; display-only.
Item	The item number and description of the item being ordered. Item: Alphanumeric, 12 positions; display-only. Description: Alphanumeric, 30 positions; display-only.

Field	Description
U/M (Retailer's unit of measure)	A standard unit by which the retailer sells the item. The retailer's unit of measure may differ from the vendor's unit of measure. Typical units of measure include: • *EA* = each • *IN* = inches • *C12* = case of 12 Validated against the Unit of Measure table (see *Working with Units of Measure (WUOM)*) and will default from the *Default Item Unit of Measure (B33)* system control value, if a value is specified. Alphanumeric, 3 positions; display-only.
Quantity	Quantity of the item, in retailer's unit of measure, that has been ordered from the vendor. Numeric, 7 positions; display-only.
Ext cost (Extended cost)	The extended cost of this PO detail line, which is calculated by multiplying the quantity ordered and the cost, adding the surcharge, and subtracting the discount. Numeric, 20 positions with a 4-place decimal; display-only.
Cost	The unit cost entered or defaulted for the item. Numeric, 13 positions with a 4-place decimal; display-only.
Primary disc (Primary discount)	The primary discount percentage to apply. Numeric, 5 positions with a 2-place decimal; display-only.
Surcharge	An additional fee to purchase this item from this vendor. A surcharge is typically added to purchases from a broker. The surcharge is defined for the vendor, but you can override it using the *Purchase Order Overrides Pop-Up Window*. Numeric, 13 positions with a 2-place decimal; display-only.

Field	Description
Trade $ (Discount 1 percentage)	The percentage of the first discount in the Vendor Discount table. The system applies this discount against the unit cost of an item on the purchase order. The resulting dollar amount for this percentage is in the Discount field located below this field. Blank if you have not defined a value for the *Vendor/PO Discount Values (E18)* system control value. The system calculates discounts based on the method from the Discount calculation method field in the Vendor Extended table. See *Purchase Order Line Discount Screen* for examples of each discount calculation method. **Note:** The system calculates primary discounts against the cost of an item before applying any other discounts. See *Overriding Discounts* for more information on how the system updates the discount percentage based on any overrides you define at the *Purchase Order Overrides Pop-Up Window*. Numeric, 11 positions with a 4-place decimal; display-only.
Coop % (Discount 2 percentage)	The percentage of the second discount in the Vendor Discount table. The system applies this discount against the unit cost of an item on the purchase order. The resulting dollar amount for this percentage is in the Discount field located below this field. Blank if you have not defined a value in the *Vendor/PO Discount Values (E18)* system control value. The system calculates discounts based on the method from the Discount calculation method field in the Vendor Extended table. See *Purchase Order Line Discount Screen* for more information. **Note:** The system calculates primary discounts against the cost of an item before any other discounts are applied. See *Overriding Discounts* for more information on how the system updates the discount percentage based on any overrides you define at the *Purchase Order Overrides Pop-Up Window*. Numeric, 11 positions with a 4-place decimal; display-only.

Field	Description
Special % (Discount 3 percentage)	The percentage of the third discount in the Vendor Discount table. The system applies this discount against the unit cost of an item on the purchase order. The resulting dollar amount for this percentage is in the Discount field located below this field. Blank if you have not defined a value in the *Vendor/PO Discount Values (E18)* system control value. The system calculates discounts based on the method from the Discount calculation method field in the Vendor Extended table. See Purchase Order Line Discount Screen for examples of each discount calculation method. See *Overriding Discounts* for more information on how the system updates the discount percentage based on any overrides you define at the Purchase Order Overrides Pop-Up Window. Numeric, 11 positions with a 4-place decimal; display-only.
Discount (Unit discount)	The amount of the first discount that the system subtracts from the unit cost of an item on the purchase order. The system calculates discounts based on the method from the Discount calculation method field in the Vendor Extended table. See Purchase Order Line Discount Screen. See *Overriding Discounts* for more information on how the system updates the discount percentage based on any overrides you define at the Purchase Order Overrides Pop-Up Window. Numeric, 13 positions with a 4-place decimal; display-only.
Discount (Unit discount)	The amount of the second discount that the system subtracts from the unit cost of an item on the purchase order. The system calculates discounts based on the method from the Discount calculation method field in the Vendor Extended table. See Purchase Order Line Discount Screen. See *Overriding Discounts* for more information on how the system updates the discount percentage based on any overrides you define at the Purchase Order Overrides Pop-Up Window. Numeric, 13 positions with a 4-place decimal; display-only.
Discount (Unit discount)	The amount of the third discount that the system subtracts from the unit cost of an item on the purchase order. The system calculates discounts based on the method from the Discount calculation method field in the Vendor Extended table. See Purchase Order Line Discount Screen. See *Overriding Discounts* for more information on how the system updates the discount percentage based on any overrides you define at the Purchase Order Overrides Pop-Up Window. Numeric, 13 positions with a 4-place decimal; display-only.
Vendor # (Vendor / item number	The Vendor item number as from the Vendor/Item table. See Working with Vendor Items (WVNI). Numeric, 7 positions; display-only.
U/M (Unit of measure)	The vendor's unit of measure for the item. This is from the Vendor/Item table. See Working with Vendor Items (WVNI). Alphanumeric, 3 positions; display-only.

Field	Description
Quantity	Quantity in the vendor's unit of measure. The system automatically calculates the quantity conversion from retailer's unit of measure to vendor's if you have set up conversion factors through the *Working with Unit of Measure Conversions (WUMC)* menu option. Numeric, 7 positions; display-only.
Vendor price	The price the vendor charges for the item. The system uses the vendor's currency, if applicable. Numeric, 13 positions with a 4-place decimal; display-only.
Ext price (Extended price)	The extended price of this PO detail line. Calculated by multiplying the price by the quantity ordered. Numeric, 20 positions with a 4-place decimal; display-only.
Vnd dscnt (Vendor discount)	The primary unit discount amount represented in the vendor's currency. Calculating discounts in a foreign currency results in inaccurate discount amounts. See *Overriding Discounts* for more information on how the system updates the primary discount based on any overrides you define at the *Purchase Order Overrides Pop-Up Window*. Numeric, 13 positions with a 4-place decimal; display-only.
Warehouse	A code that represents the warehouse where the item will be received. Numeric, 3 positions; display-only.
Ship via	A code that represents a carrier used for shipping merchandise to your company. See *Working with Purchase Order Ship Via (WPSV)*. Numeric, 2 positions; display-only.
Due date	The date the PO is due to be received. Numeric, 6 positions (in user date format); display-only.
Cancel date	The date the purchase order will be marked for cancellation if the order is not received. See *Printing the PO Auto Cancel Report (MPAC)*. Numeric, 6 positions (in user date format); optional.
Promise date	You can use this date to represent the expected ship date or promised arrival date. Numeric, 6 positions (in user date format); optional.
Offer	The code for the offer (catalog). See *Working with Offers (WOFR)*. Alphanumeric, 3 positions; display-only.
Buyer	A code that identifies a person who is authorized to make purchases for your company. See *Working with Buyers (WBUY)*. Alphanumeric, 3 positions; display-only.

Screen Option	Procedure
Accept the purchase order	Select *Accept* to accept the purchase order. See *Completing PO Maintenance*.
Reject the purchase order	Select *Reject* to reject the purchase order. See *Completing PO Maintenance*

Screen Option	Procedure
Change item information associated with any previously entered item	Select *Change* to advance to the *PO Maintenance - Maintain Detail Screen*.
Work with PO header information	Select *P/O Header* to advance to the *Work with Purchase Order (Header) Screen*.
Work with purchase order line discounts	Select *Discounts* to advance to the *Purchase Order Line Discount Screen*.
Work with estimated charges	Select *Estimated Charges* to advance to the *Work with PO Header Estimated Charges Screen*.
Work with vendor item notes for the last item entered.	Select *Vendor Item Notes* to advance to the *Work with Vendor Item Notes Screen*.
Horizontal entry	Select *Horizontal Entry* to create PO detail lines for items that contain multiple SKUs.
Vendor item entry	Select *Vendor Item Entry* to create a PO detail line by entering the vendor item number.
Non-inventory entry	Select *Non Inventory Entry* to create a PO line for an item that does not exist in the Item table.
Display summary information	Select *Summary* to advance to the *Purchase Order Summary Screen*.
PO detail messages	Select *Line Messages* to advance to the *Work with PO Detail Messages Screen*.

Purchase Order Line Discount Screen

Purpose: Use this screen to enter or change the discount amounts of the three discount fields for a detail line.

How to display this screen: Select *Discounts* on the:

- *Create PO Detail Standard Screen*
- *PO Maintenance - Change PO Detail Screen*

Field	Description
P/O #	The number assigned to this purchase order. Numeric, 7 positions; display-only.
Line # (Detail line number)	The purchase order detail line number. Numeric, 3 positions; display-only.
Item	The item being ordered for this detail line. Alphanumeric, 12 positions; display-only.
Item description (Unlabeled field below the Item)	The description of the item on this detail line. Alphanumeric, 120 positions; display-only.
Order quantity	The quantity of the item, in retailer’s unit of measure, defaulted from the previous screen. Numeric, 5. positions, display-only.

Field	Description
Cost	The price you pay for this item, per retailer's unit of measure, as defined in the Vendor Item table for the vendor's unit of measure. For example, if the vendor sells this item in pairs, for $12.00 per pair, but you resell the item as a single unit, the Cost of the item would be $6.00. If a cost does not exist in the Vendor Item table (see *Working with Vendor Items (WVNI)*), the system pulls the cost from the Item SKU table. Numeric, 13 positions with a 4-place decimal; display-only.
Discount (Primary discount)	The primary discount percentage defined for this vendor that the system applies to this detail line. You establish the primary discount in the Vendor table. Any other discounts for this detail line are applied after the primary discount has been calculated. Numeric, 5 positions with a 2-place decimal; display-only.
Ext cost (Extended cost)	The extended cost of this purchase order detail line, which is calculated by multiplying the quantity ordered and the cost, adding the surcharge and subtracting the discount. Numeric, 20 positions with a 4-place decimal; display-only.
Vendor price	The price the vendor charges for the item. The system uses the vendor's unit of measure, and the vendor's currency, if applicable. Calculating discounts in a foreign currency results in inaccurate discount amounts. Numeric, 13 positions with a 4-place decimal; display-only.
Vendor dsct (Vendor discount)	The primary unit discount amount represented in the vendor's currency. Calculating discounts in a foreign currency results in inaccurate discount amounts. Numeric, 13 positions with a 2-place decimal; display-only.
Ext price (Extended price)	The extended price of this purchase order detail line. Extended price is calculated by multiplying the price by the quantity ordered. Numeric, 20 positions with a 4-place decimal; display-only.
Discount (Discount fields)	The names of the three discount fields from the *Vendor/PO Discount Values (E18)* system control value. **Note:** The system calculates the primary discount on a purchase order before calculating other discounts. Alphanumeric, 11 positions; display-only.

Field	Description
Percent (Discount percentage)	The percentage the system calculates against the unit cost of an item on the purchase order. If you enter a discount percentage, you cannot enter a unit discount for the same discount field. The system calculates discount percentages before subtracting any dollar discounts. **Note:** The system calculates percentage discounts based on the method from the Discount calculation method field in the Vendor Extended table. See *Combined Discount Calculation* and *Tiered Discount Calculation* for examples of each discount calculation method. See *Overriding Discounts* for more information on how the system updates the percent and unit discounts based on any overrides you define at the *Purchase Order Overrides Pop-Up Window*. Numeric, 6 positions with a 2-place decimal; optional.
Unit discount	The amount the system subtracts from the unit cost of an item on the purchase order. If you enter a unit discount amount, you cannot enter a discount percentage for the same discount field. **Note:** The system calculates unit discounts based on the method from the Discount calculation method field in the Vendor Extended table. See *Combined Discount Calculation* and *Tiered Discount Calculation* for examples of each discount calculation method. See *Overriding Discounts* for more information on how the system updates the percent and unit discounts based on any overrides you define at the *Purchase Order Overrides Pop-Up Window*. Numeric, 13 positions with a 4-place decimal; optional.
Vendor discount (Vendor discounts)	The unit discount amount calculated in the vendor's currency. Calculating discounts in a foreign currency results in inaccurate discount amounts. Numeric, 13 positions with a 4-place decimal; display-only.

Instructions: Use the following steps to create or change a vendor discount:

1. Complete the Percent or Unit discount field for each discount. If you leave both the Percent and Unit discount fields blank, no discount will apply.
2. Optionally, select *Change Unit Disc* to change the enterable field for a discount label to the other discount field. For example, if your cursor is placed in the Percent field for

discount 1, selecting *Change Unit Disc* will clear any amount in the Percent field and allow you the enter an amount in the Unit discount field for discount 1.

3. Select *Accept*. The Confirm Accept pop-up window opens. Select *OK* to accept the changes you have made or select *Exit* to cancel.
4. The system calculates the discounts and updates the Extended cost, Extended price, Unit discount and Vendor discount fields with the changes.

Select *Exit* to return to the purchase order detail entry screen from which you advanced to this screen.

For more information: See *Combined Discount Calculation* and *Tiered Discount Calculation* for examples of how the system calculates discounts based on the Discount calculation method field in the Vendor Extended table.

Applying Discounts to a Purchase Order Line

Purpose: The system calculates discounts based on the Discount calculation method field defined for the vendor on the purchase order line.

- *Combined* = The discount method combines the total dollar amount of all 3 discounts to determine the net cost.
- *Tiered* = The discount method calculates the largest discount against the purchase order's gross cost, then the second largest discount is calculated against the net result of the first discount, and the third largest discount is calculated against the net result of the second discount.
- Blank = No discount is applied; you will not be able to apply any discounts when working with a purchase order, regardless of the entries in the discount fields.

Combined Discount Calculation

The combined discount calculation method combines the values of all 3 discounts to determine the net cost. Any discount percentages defined for the discounts are calculated before the unit discounts are applied.

Example:

```
Cost of item = $100.00
```

```
Primary discount (defined in Vendor table) = 10%
```

```
Discount 1 = $10.00 (unit discount)
```

```
Discount 2 = 20% (percentage discount)
```

```
Discount 3 = 10% (percentage discount)
```

Step 1: Calculate the primary discount percentage

```
primary discount (10%) x cost ($100.00) = unit discount amount for primary
discount ($10.00)
```

Step 2: Subtract the primary discount amount from the cost

```
primary discount ($10.00) - cost ($100.00) = cost after primary discount
($90.00)
```

Step 3: Calculate discount 2 percentage

```
discount 2 (20%) x cost ($90.00) / 100 = unit discount amount for discount 2
($18.00)
```

Step 4: Calculate discount 3 percentage

```
discount 3 (10%) x cost ($90.00) / 100 = unit discount amount for discount 3
($9.00)
```

Step 5: Add discount amounts 1, 2 and 3 together

```
discount 2 ($18.00) + discount 3 ($9.00) + discount 1 ($10.00) = combined
discount ($37.00)
```

Step 6: Subtract the total combined discount amount from the cost

```
total combined discount ($37.00) - cost ($90.00) = net cost ($53.00)
```

Tiered Discount Calculation

The tiered discount calculation method calculates:

- the largest discount against the item's cost, then
- the second largest discount is calculated against the net result of the first discount, then
- the third largest discount is calculated against the net result of the second discount

Any discount percentages defined for the discount fields are calculated before the unit discounts are applied.

Example:

```
Cost of item = $100.00
```

```
Primary discount (defined in Vendor table) = 10%
```

```
Discount 1 = $10.00 (unit discount)
```

```
Discount 2 = 20% (percentage discount)
```

```
Discount 3 = 10% (percentage discount)
```

Step 1: Calculate the primary discount percentage

```
primary discount (10%) x cost ($100.00) = unit discount amount for primary
discount ($10.00)
```

Step 2: Subtract the primary discount amount from the cost

```
primary discount ($10.00) - cost ($100.00) = cost after primary discount
($90.00)
```

Step 3: Calculate the largest discount percentage

```
discount 2 (20%) x cost ($90.00) / 100 = largest discount amount ($18.00)
```

Step 4: Subtract the largest discount amount from cost

```
gross cost ($90.00) - largest discount ($18.00) = net of first calculation
($72.00)
```

Step 5: Calculate the 2nd largest discount percentage

```
discount 3 (10%) x net of first calculation ($72.00) / 100 = second largest
discount amount ($7.20)
```

Step 6: Subtract the 2nd largest discount amount from cost

```
net of first calculation ($72.00) - second largest discount amount ($7.20)
= net of second calculation ($64.80)
```

Step 7: Subtract the 3rd largest discount amount from cost

```
net of second calculation ($72.00) - third largest discount amount
($10.20) = net of second calculation ($54.80)
```

Update SKU Cost Window

Use this window to update the cost of all open and held lines on the PO that contain the item specified.

How to display this screen: Select *Update SKU Cost* on the *PO Maintenance - Change PO Detail Screen*.

Field	Description
PO #	The number assigned to the purchase order. Numeric, 7 positions; display-only.
Item #	The item number whose cost you wish to update. The system updates the cost for all SKUs of this item that are on the PO. Alphanumeric, 12 positions; display-only.
Cost	The unit price you pay the vendor for this item, per retailer's unit of measure. Enter the new cost for the item. The system updates the cost for all open and held lines on the PO that contain the item specified. The *Override PO Cost (A17)* secured feature controls access to this field. **Note:** You cannot change the cost of an existing purchase order line to zero, even if the vendor/item price and price from the SKU table are zero. **Order Orchestration PO Changes** When you change the cost for a drop ship purchase order line which has been sent to the *Order Orchestration Drop Ship Integration* for processing, Order Administration automatically sends the changed cost information to Order Orchestration, where the cost on the purchase order line updates automatically. Numeric, 13 positions with a 4-place decimal; required.

Instructions: Use the following steps to update the cost of all open and held lines on the PO that contain the item specified.

1. In the Cost field, enter the cost to assign to all open and held lines on the PO that contain the specified item.

2. Select *OK*. The system returns you to the *PO Maintenance - Maintain Detail Screen* and displays the message `The SKU cost on all of the lines has been changed`.

Tracking PO line changes: For each PO line whose cost was updated, the system writes a before and after record to the PO Detail Audit table to record the cost of the PO line before the SKU cost update, and the cost of the PO line after the SKU cost update. You can review PO line history on the *Display PO Detail History Screen*.

Work with Purchase Order (Header) Screen

Purpose: Use this screen to change the header information on an existing purchase order.

When you change PO Header information: If you change the buyer, ship via, offer, due date, cancel date, or promise date on the PO header, the system updates the value on each existing PO line in an open or held status. The system also updates the value for any new lines you add to the PO in PO Maintenance, unless you override the value at the detail level.

Tracking PO changes: When you change the information on the PO header, the system writes a before and after record to the PO Header Audit table to record the value before the change and the value after the change. If the change to the PO header also updated the lines on the PO, the system writes a before and after record to the PO Detail Audit table to record the value on the PO line before the change, and the value on the PO line after the change. You can review PO line history on the *Display PO Detail History Screen*.

How to display this screen: Select *Header* on the *PO Maintenance - Maintain Detail Screen*.

Field	Description
PO #	The number assigned to the PO. Numeric, 7 positions; display-only.
Ship to	You have the option to select Warehouse, Customer number, or Order number. Each option is described below. **Warehouse** If you change the warehouse on the PO header, the system updates only the PO lines that contain an item that exists in the new warehouse; any PO lines on the PO that contain items that do not exist in the new warehouse are not updated. **Note:** The warehouse code can be overridden for any line on the order. The system will track the on order total for each item in each warehouse, based on the code entered here or on the detail line. In addition, the warehouse code will control which shipping address prints on the PO or is transmitted in the EDI table. A separate PO will be printed for each warehouse to each different ship-to address. Numeric, 3 positions; optional.

Field	Description
	Customer # or Order # Unique numbers assigned to customers or orders for identification purposes. If you are entering a drop ship PO where the merchandise will be shipped directly to the customer, you must enter either a customer or order number. The system checks one of these tables to determine the ship-to address for the purchase order. If customer number is entered, the system does not tie this number to the order, nor does it pull through the items on the order. Numeric, 9 positions; optional.
Status	The status of the purchase order. Status options: • Cancelled • Docked • Held • Open • Suspended • Closed If held, the purchase order must be approved via PO Maintenance before you can print or receive the PO. Alphanumeric, 10 positions; display-only.
Vendor	The vendor assigned to the PO. Numeric, 7 positions; display-only.
Vendor name/address	The supplier's name and address. This information defaults from the Vendor table and cannot be changed. Alphanumeric, 30 positions; display-only.
Warehouse/customer	The name and address of the warehouse or the customer, depending on which information you entered previously. This information defaults from the Warehouse or Customer table and cannot be changed. Alphanumeric, 30 positions; display-only.
Placed with	The name of the person at the vendor site with whom you placed the purchase order. This name is used for future reference. When you first enter this screen, the cursor is in this field. Alphanumeric, 30 positions; optional.
Type	Indicates whether this purchase order is an initial buy (I) or a reorder (R). Valid values are: • *Initial Buy* (default) • *Reorder* Optional.

Field	Description
Buyer	A code that identifies a person who is authorized to make purchases for your company. Buyer codes are defined in and validated against the Buyer table; see *Working with Buyers (WBUY)*. *Changing the buyer:* If you change the buyer on the PO header, the system updates the buyer on each existing PO line in an open or held status: `PO Dtl'Buyer' info has been updated for open/held rcds`. The system also updates the value on any new lines you add to the PO in PO Maintenance, unless you override the value at the detail level. Numeric, 3 positions; required.
Ship via	A code that identifies the shipper to deliver the merchandise to you. This code is validated against the PO Ship Via table. See *Working with Purchase Order Ship Via (WPSV)*. These shippers are defined separately from, and may differ from, those who deliver merchandise to your customers. *Changing the ship via:* If you change the ship via code on the PO header, the system updates the ship via code on each existing PO line in an open or held status: `The ship via on all of the lines has been changed`. The system also updates the value on any new lines you add to the PO in PO Maintenance, unless you override the value at the detail level. **Note:** If a purchase order ship via is defined for the vendor/item, the system defaults this ship via to any new lines added to the PO in PO Maintenance instead of defaulting the ship via on the PO header. Numeric, 2 positions; optional.
Offer	The code for the offer (catalog) you will use to sell the merchandise. See *Working with Offers (WOFR)*. The system creates a SKU/Offer record for each item on the purchase order if one does not already exist. *Changing the offer:* If you change the offer code on the PO header, the system updates the offer code on each existing PO line in an open or held status: `The Offer number has been changed on all detail lines`. The system also updates the value on any new lines you add to the PO in PO Maintenance, unless you override the value at the detail level. Alphanumeric, 3 positions; may be required.

Field	Description
Due date	The date the purchase order is due for receipt. This is the date the operator sees in Order Entry. *Changing the due date:* If you change the due date on the PO header, the system updates the due date on each existing PO line in an open or held status: `The Due Dates on all of the lines have been changed`. The system also updates the value on any new lines you add to the PO in PO Maintenance, unless you override the value at the detail level. Numeric, 6 positions (in user date format); optional.
Cancel date	The date the purchase order will be marked for cancellation if you do not receive it. See *Printing the PO Auto Cancel Report (MPAC)*. *Changing the cancel date:* If you change the cancel date on the PO header, the system updates the cancel date on each existing PO line in an open or held status: `The Cancel Dates on all of the lines have been changed`. The system also updates the value on any new lines you add to the PO in PO Maintenance, unless you override the value at the detail level. Numeric, 6 positions (in user date format); optional.
Promise date	You can use this date to represent the expected ship date or promised arrival date. *Changing the promise date:* If you change the promise date on the PO header, the system updates the promise date on each existing PO line in an open or held status: `Promise date changed on all detail lines`. The system also updates the value on any new lines you add to the PO in PO Maintenance, unless you override the value at the detail level. Numeric, 6 positions (in user date format); optional.
Shipping info	One line of shipping instructions to print on the purchase order. Alphanumeric, 20 positions; optional.

Screen Option	Procedure
Place the purchase order on hold	Select *Hold* to hold the purchase order. A message informs you the purchase order is on hold.
Accept the purchase order	Select *Accept* to accept the changes you made to the purchase order in PO Maintenance. See *Completing PO Maintenance*.
Reject the purchase order	Select *Reject* to reject the changes you made to the purchase order in PO Maintenance. A window opens asking you to confirm the rejection. See *Completing PO Maintenance*.
Work with vendor	Select *FOB* to advance to the *Work with FOB for Purchase Order Screen*.
Work with purchase order header estimated charges	Select *Est Charges* to advance to the *Work with PO Header Estimated Charges Screen*.
Work with vendor notes	Select *Vendor Notes* to advance to the *Work with Vendor Notes Screen*.

Screen Option	Procedure
Work with PO overrides	Select *P/O Overrides* to advance to the *Purchase Order Overrides Pop-Up Window*.
Accept and print the purchase order	Select *Accept/Print* to accept the purchase order changes and advance to the *Print P/O Window*.
Work with PO summary	Select *P/O Summary* to advance to the *Purchase Order Summary Screen*.
Work with PO messages	Select *P/O Msg* to advance to the *Work with PO Messages Screen*.

Work with FOB for Purchase Order Screen

Purpose: Use this screen to create, change or delete vendor FOB records for a specific purchase order.

> **Note:**
>
> Any change you make from this screen updates only this purchase order and does not affect the Vendor FOB addresses defined on the *Work with Vendor FOB Address Screen*.

About FOB address: The FOB (freight on board) address is the location where title to merchandise being shipped passes from the seller to the buyer.

Types of FOB addresses: If the FOB address is an *Origin* type, ownership of the merchandise passes from seller to buyer at the origin of the shipping route, and the buyer is responsible for transportation costs and risk of loss or damage from that point. If the FOB address is a *Destination* type, ownership of the merchandise passes from seller to buyer at the receiving point for the merchandise, and the seller is responsible for transportation costs and risk of loss or damage until the merchandise reaches its destination.

How to display this screen:

- Select *FOB* at the *Work with Purchase Order (Header) Screen*.
- Select *FOB* at the *PO Maintenance - Maintain Detail Screen*.

Field	Description
Vendor	The vendor number and description for this purchase order. Vendor number: Numeric, 7 positions; display-only. Vendor description: Alphanumeric, 30 positions; display-only.

Field	Description
Type	This code identifies the FOB address as either a Destination or an Origin type. • *Destination* = the FOB address is the location to which merchandise is being shipped (its destination); title of the merchandise passes from the seller to the buyer when the merchandise reaches its destination. • *Origin* = the FOB address is the location from which the merchandise is shipped; title to the merchandise passes from the seller to the buyer when the merchandise leaves the seller's dock. Alphanumeric, optional.
City	The city of the FOB address. Alphanumeric, 25 positions; optional.
St	The state of the FOB address. Alphanumeric, 2 positions; optional.
Postal cd	The zip code of the FOB address. Alphanumeric, 10 positions; optional.
Freight terms	A brief description of the freight terms for this FOB address. Alphanumeric, 10 positions; optional.

Screen Option	Procedure
Create a vendor FOB address for this purchase order	Select *Create* to advance to the *Create FOB for Purchase Order Screen*.
Change an FOB address for this purchase order	Select *Change* for an FOB address to advance to the Change FOB for Purchase Order Screen. See the *Create FOB for Purchase Order Screen* for field descriptions and screen information.
Delete an FOB address for this purchase order	Select *Delete* for an FOB address to delete it.
Display an FOB address for this purchase order	Select *Display* for an FOB address to advance to the Display FOB for Purchase Order Screen. See the *Create FOB for Purchase Order Screen* for field descriptions.

Create FOB for Purchase Order Screen

Purpose: Use this screen to create a new FOB address for the purchase order.

> **Note:**
>
> The FOB address you create will be added to the list of FOB addresses for this purchase order only; it will not be added to the list of FOB addresses for this vendor defined through the *Work with Vendor FOB Address Screen*.

How to display this screen: Select *Create* at the *Work with FOB for Purchase Order Screen*.

Field	Description
PO #	The current purchase order number. Numeric, 7 positions; display-only.
Vendor	The vendor number and description of the vendor for this purchase order. Vendor number: Numeric, 7 positions; display-only. Vendor description: Alphanumeric, 30 positions; display-only.
Postal code	The zip code for the vendor. The first three characters of the postal code are validated against the SCF (Sectional Center Facility) table, and must be valid SCF codes associated with the city and country you enter. See *Working with SCF Codes (WSCF)*. Alphanumeric, 10 positions; required.
City/State/Country	The city, state and country of the FOB address. **Note:** If the *Use Zip/City/State Defaulting? (B13)* system control value (SCV B13) is *selected*, the City, State, and Country fields will automatically display the correct address information when you enter a zip code in the Postal Code field. City: Alphanumeric, 25 positions; required. State: Alphanumeric, 2 positions; required. Country: Alphanumeric, 3 positions; required.
Freight terms	A brief description of the freight terms for this vendor FOB address. Alphanumeric, 10 positions; required.
FOB type	This code identifies the FOB address as either a Destination type or an Origin type. • *Destination* = the FOB address is the location to which merchandise is being shipped (its destination); title of the merchandise passes from the seller to the buyer when the merchandise reaches its destination. • *Origin* = the FOB address is the location from which the merchandise is shipped; title to the merchandise passes from the seller to the buyer when the merchandise leaves the seller's dock. Alphanumeric, required.

Work with PO Header Estimated Charges Screen

Purpose: Use this screen to define estimated charges for every detail line on the purchase order.

You can define the following types of estimated charges for a purchase order header or detail line:

- freight

- brokerage
- commission
- duty
- import
- prep
- royalty
- surcharge
- other fees

In purchase order maintenance, you can enter the estimated charge as a unit cost or a percentage. You enter the actual charges (for freight, brokerage, etc.) for the detail line at purchase order receiving. These charges are not reflected in the extended price of the purchase order.

Changing a purchase order estimated charge in purchase order maintenance generates a purchase order history message indicating that the charge has been changed.

Purchase order additional charge codes are defined through *Working With PO Additional Charges (WPAC)*.

When you add, change, or delete an estimated charge at this screen, the system applies the charge to each existing detail line and each additional detail line you add to the purchase order that is in a open or held status. If an existing detail line was already associated with the same estimated charge you defined at this screen, the system overrides the charge amount defined for the detail line to the header charge amount.

How to display this screen: Select *Estimated Charges* on the *Work with Purchase Order (Header) Screen*.

Field	Description
PO #	The number of the purchase order you are currently working with, defaulted from the *Work with Purchase Order (Header) Screen*. Numeric, 7 positions; display-only.
Status	The status of the purchase order, defaulted from the *Work with Purchase Order (Header) Screen*. Alphanumeric, 10 positions; display-only.
Vendor	The vendor number and vendor name defined for this purchase order, defaulted from the *Work with Purchase Order (Header) Screen*. Vendor number: Numeric, 7 positions; display-only. Vendor name: Alphanumeric, 30 positions; display-only.

Field	Description
Code	A code that represents the charge to be added to the purchase order detail line. The following message indicates if you try to enter an estimate charge that has already been defined: PO Estimate Charge already exists. If the estimate charge you enter on the header screen already exists on a purchase order detail line, the system allows you to create the purchase order header estimate charge. The amount you define at the header screen overrides the amount defined for the purchase order detail line. If you wish to have the amount for an estimate charge different for a specific detail line, you must first enter the header charge and then overide the amount for the detail line. Purchase order additional charge codes are defined in and validated against the PO Additional Charge table; see *Working With PO Additional Charges (WPAC)*. Numeric, 2 positions; optional.
Complete the Unit Cost or Percent field:	
Unit cost	The unit charge (per unit in retailer's unit of measure) for a purchase order detail line for brokerage, commission, duty, freight, import, surcharge, or other user-defined fees. The actual charges from the vendor for these fees are entered at PO Receiving. Multiplied by the quantity ordered to determine the estimated charge. The unit cost is used in lieu of a percentage to calculate the additional estimated charge. The following message indicates if you do not define either a unit cost or percentage for a charge code: `Unit Cost or Percent must be entered`. The following message indicates if you try to enter a charge code that has already been defined: `PO Estimate Charge already exists`. The following message indicates if you try to enter a unit cost and unit percentage for a charge code: `Enter Unit Cost or Percent; but not both`. Numeric, 13 positions with a 4-place decimal; optional (required if percent is not entered).

Field	Description
Percent	The percentage used to calculate the additional charges on a purchase order detail line. Used in lieu of an additional charge based on unit cost. The percentage value is multiplied by the extended price on the purchase order detail line to determine the estimated charge. The actual charge for an additional charge is captured at PO Receiving. If you do not have authority to the *Access Estimated Charge Percent (B01)* secured feature, the percent field is display-only and you cannot enter an estimated charge percentage. The following message indicates if you do not define either a unit cost or percentage for a charge code: `Unit Cost or Percent must be entered`. The following message indicates if you try to enter a charge code that has already been defined: `PO Estimate Charge already exists`. The following message indicates if you try to enter a unit cost and unit percentage for a charge code: `Enter Unit Cost or Percent; but not both`. Numeric, 5 positions with a 2-place decimal; optional (required if unit cost is not entered).

Instructions:

- Select *Add/Change* to activate the add/change function. The system displays the same screen; however, you are able to change previously added information.
- Complete the necessary fields.
- When you return to the previous screen, the system displays the following message to indicate the charges have been applied to each purchase order detail line.

All detail estimated charges have been updated with changes

Screen Option	Procedure
Toggle between add mode and change mode	Select *Add/Change*. The existing charges on the screen change to display-only or enterable fields.

Purchase Order Overrides Pop-Up Window

Purpose: Use this window to define overrides to the vendor record for this purchase order only without updating the vendor record itself.

Overriding Discounts

If you override one or more of the vendor discount fields in PO maintenance:

- the overrides are applied to any new PO lines added during PO maintenance.
- the system applies the overrides only to existing PO lines that do not currently have any discount defined (a discount is not defined in the primary discount, percent discount, or unit discount fields).

- if a PO line without discounts has already been partially received, the system applies the overrides to the remaining quantity waiting to be received.

System control value: The *Apply Discount To Manual Cost (D96)* system control value defines whether purchase order discounts are applied against a manually entered cost; select this system control value to receive discounts against manually entered costs.

Example: You enter a PO for a vendor with no primary discount or percent or unit discounts.

Scenario	Results
You enter PO line 1 for 1 unit at 25.00.	The system creates PO line 1 with an extended cost of 25.00 (no discounts applied).
You enter PO line 2 for 1 unit at 25.00 and add a trade unit discount of *5.00*.	The system applies the *5.00* trade unit discount to PO line 2, updating the extended cost to 20.00 (25.00 - 5.00 = 20.00)
In PO Maintenance:	
At the Purchase Order Overrides window, you enter a primary discount override of *5.00%*.	The system applies the *5.00%* primary discount override to PO line 1. The system does not apply the 5.00% primary discount override to PO line 2 since the line currently has a *5.00* trade unit discount.
You add PO line 3 for 1 unit at 25.00.	The system applies the *5.00%* primary discount override to PO line 3.

How to display this screen: At the *Work with Purchase Order (Header) Screen*, select *P/O Overrides*.

Field	Description
Reference #	A reference number you can use if you have the system assign purchase order numbers and you want to track an internal purchase order number or a tracking number on the purchase order. Reference numbers can be used in P/O Inquiry to scan for a specific purchase order number. The reference number may print on the PO, depending on the print program from the *PO Print Program (C64)* system control value. Alphanumeric, 15 positions; optional.
Terms	A code that represents a type of payment terms, such as net 30 days. The terms default from the Vendor table will display here, but can be overridden for any order. Terms are validated against the Terms code table. Numeric, 2 positions; optional.
Vendor reference #	An internal reference number that may be stored with the purchase order. For example, the reference number may represent an internal purchase order number from a preprinted purchase order, or an internal control for departmental purchase orders. Information in this field will be available to print on the PO or any report. Alphanumeric, 15 positions; optional.

Field	Description
Negotiate price	Determines whether the program pulls prices for items entered. • *Selected* = You must enter a price for each item. • *Unselected* = The system will automatically pull prices for each item. Prices will be pulled from: 1. Vendor/Item quantity break table 2. Vendor/Item table 3. Item table.
Primary discount %	The primary discount percentage applied to each item ordered from this vendor. The primary discount percent defaults from the Vendor table. You may enter an override to the primary discount percentage established for this vendor towards purchases. The override to the Discount % is valid only for the current purchase order. See *Overriding Discounts* for more information on how the system updates the discount percentage based on any overrides you define at the Purchase Order Overrides Pop-Up Window. Numeric, 5 positions with a 2-place decimal; optional.
Confirming PO	Determines whether this is a confirming purchase order. If this is a confirming purchase order, you can print confirming purchase orders and the purchase order will indicate that it is a confirming document when you print it; see Printing Purchase Orders. If you are using EDI to transmit orders and follow up with the printed order, the system indicates on the printed document that it is a confirmation of an EDI transmission. • *Selected* = The order was placed over the phone with a vendor and this is a confirming PO. • *Unselected* = This is not a confirming PO.
Tax exempt #	The Ship to field's reseller or tax exempt certificate number for this drop ship purchase order. May default from the Tax identification field in the Customer record. Alphameric, 15 positions; optional.
Currency rate	The currency of the vendor or broker from whom the purchase order is being placed. If a foreign currency value is entered, the system will store the vendor's currency on the PO and will calculate your currency whenever necessary, (e.g., during inquiry and reporting). See Working with Currency (WCUR). Alphanumeric, 3 positions; optional.
Surcharge %	You may override or enter a surcharge that is added to purchases from this vendor. A surcharge is typically added to purchases from a broker. If a Surcharge % is defined in the Vendor table, it will default here. The surcharge percent is reflected in the price of each item. Numeric, 5 positions with a 2-place decimal; optional.

Field	Description
Percent discount	The percentage the system applies against the unit cost of an item on the purchase order. Percentage discounts are defined in and validated against the Vendor Discount table. If you enter a discount percentage, you cannot enter a unit discount for the same discount field. The system calculates discount percentages before subtracting any dollar discounts. The text for the 3 percent discounts is blank if a value has not been defined in the *Vendor/PO Discount Values (E18)* field in the System Control field. **Note:** The system calculates percentage discounts based on the method from the *Discount calculation method* field in the Vendor Extended table. See *Purchase Order Line Discount Screen* for examples of each discount calculation method. See *Overriding Discounts* for more information on how the system updates the percent and unit discounts based on any overrides you define at the *Purchase Order Overrides Pop-Up Window*. Numeric, 11 positions with a 4-place decimal; optional.
Unit discounts	The amount the system subtracts from the unit cost of an item on the purchase order. Unit discounts are defined in and validated against the Vendor Discount table. If you enter a unit discount amount, you cannot enter a discount percentage for the same discount field. The text for the 3 unit discounts is blank if you have not defined a value in the *Vendor/PO Discount Values (E18)* field in the System Control field. **Note:** The system calculates unit discounts based on the method from the *Discount calculation method* field in the Vendor Extended table. See *Purchase Order Line Discount Screen* for examples of each discount calculation. See *Overriding Discounts* for more information on how the system updates the percent and unit discounts based on any overrides you define at the *Purchase Order Overrides Pop-Up Window*. Numeric, 13 positions with a 4-place decimal; optional.

Work with PO Messages Screen

Purpose: Use this screen to define or update message text that may print on the purchase order. These messages can also be displayed in PO Inquiry/Maintenance and Receiving.

How to display this screen: Select *PO Msg* at the:

- *Work with Purchase Order (Header) Screen*
- *PO Maintenance - Maintain Detail Screen*

You can also display this screen by selecting *Messages* at the *Display Purchase Order Header Screen* in PO inquiry.

Field	Description
Message	Free-form message about the vendor and/or order. You can mark any portion of the message to print on the PO, or you can use the messaging capability to keep detailed notes about the order for internal use. Alphanumeric, 60 positions (each line); optional.
Print	Select *Print on PO* to print on the purchase order; otherwise, leave this option blank. Optional.

Entering messages: Select *Add/Change* to activate the add/change function. The system displays the same screen; however, you are able to change previously added information.

Purchase Order Summary Screen

Purpose: Use this screen to review the PO detail lines that have been entered on the purchase order. You can also use this screen to view the running totals for the purchase order as a whole and the individual totals for each detail line. Up to eight purchase order detail lines appear on this screen at one time. This screen also allows you to accept or reject the entire purchase order if PO detail line entry is completed.

How to display this screen: Select *Summary* at the At the *Create PO Detail Standard Screen*, another detail entry screen, the *Work with Purchase Order (Header) Screen*, or the *\PO Maintenance - Maintain Detail Screen*.

Field	Description
P/O #	The number assigned to a purchase order, defaulted from the *Work with Purchase Order (Header) Screen*. Numeric, 7 positions; display-only.
Rev # (Revision number)	The number of times a purchase order has been revised. When you initially create a purchase order, the revision number is 1. Numeric, 3 positions; display-only.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Status</td><td>The status of the purchase order. When you first create a PO, the status will be Open or Suspended.
Status options:
• Canceled = The purchase order was canceled through PO Maintenance; it exists on the system for historical purposes.
• Closed = All lines on the purchase order have been received through PO Receiving.
• Held = The PO must be approved through PO Maintenance before receipts can occur.
• Open = The PO exists on the system awaiting PO Receipts.
• Suspended = Inventory has been received into suspense through the PO Receiving function.
Alphanumeric, display-only.</td></tr>
<tr><td>Vendor #</td><td>The code that identifies the vendor or supplier of an item.
Numeric, 7 positions; display-only.</td></tr>
<tr><td>Ord qty (Order quantity)</td><td>The quantity of the item that has been ordered (in retailer’s unit of measure) from the vendor.
Numeric, 7 positions; display-only.</td></tr>
<tr><td>Opn qty (Open quantity)</td><td>The total quantity on the purchase order that has not been assigned to backorders through the PO layering function. The system updates this value.
Numeric, 7 positions; display-only.</td></tr>
<tr><td>Ext cost (Extended cost)</td><td>The extended cost or sum of all open PO detail lines.
Numeric, 20 positions with a 4-place decimal; display-only.</td></tr>
<tr><td>Act chrge (Actual charges)</td><td>The actual additional charges associated with the purchase order. Actual charges are assigned in PO Receiving.
Numeric, 13 positions with a 4-place decimal; display-only.</td></tr>
<tr><td>Est chrge (Estimated charges)</td><td>The estimated additional charges for this entire purchase order. Represents the sum of all additional charges for each line.
Numeric, 20 positions with a 4-place decimal; display-only.</td></tr>
<tr><td>Weight</td><td>The cumulative weight of all items ordered on the purchase order which is calculated by multiplying the ship weight and the quantity ordered. If no Ship weight is defined in the Vendor/ Item table, weight is taken from the Item table.
Numeric, 7 positions with a 3-place decimal; display-only.</td></tr>
<tr><td>Cube</td><td>The cumulative cubic volume of all items ordered on the purchase order which is calculated by multiplying the cubic volume and the quantity ordered. If no Cubic volume is defined in Vendor/Item table, cube is taken from the Item table.
Numeric, 7 positions; display-only.</td></tr>
<tr><td>Line</td><td>The purchase order line number. Up to 999 lines may exist on one purchase order.
Numeric, 3 positions; display-only.</td></tr>
</table>

Field	Description
Status	The status of the purchase order. Status options: • *Cancelled* • *Hold* • *Open* • *Suspended* • *Complete* Alphanumeric, display-only.
Item/Cls Size	The item number and SKU being ordered. Alphanumeric, 12 positions (item), three 4-position fields (SKU); display-only.
U/M (Unit of measure)	A standard by which an item is sold. Typical units of measure include: • *EA* = each • *IN* = inches • *C12* = case of 12 Validated against the Unit of Measure table; see *Working with Units of Measure (WUOM)*. Alphanumeric, 3 positions; display-only.
Ord qty (Order quantity)	The quantity ordered, in retailer's unit of measure. Numeric, 7 positions; display-only.
Opn qty (Open quantity)	The total quantity of the line item that has not been assigned to backorders through the PO layering function. The system updates this value. Numeric, 7 positions; display-only.
Ext cost (Extended cost)	The extended cost of this PO detail line, which is calculated by multiplying the quantity ordered and the price per retailer's unit of measure, adding the surcharge, and subtracting the discount. Numeric, 20 positions with a 4-place decimal; display-only.

Screen Option	Procedure
Accept the purchase order information	Select *Accept* to accept the PO. See *Completing PO Maintenance*.
Reject the purchase order information	Select *Reject* to reject the PO. See *Completing PO Maintenance*.

Completing PO Maintenance

Purpose: To complete PO maintenance, perform one of the following:

- *Accept Purchase Order*
- *Reject Purchase Order*
- *Approve Purchase Order*
- *Cancel Purchase Order*

Accept Purchase Order

On the *Work with Purchase Order (Header) Screen*, select *Accept/Print* to accept a purchase order and advance to the *Print P/O Window*. This option is not available at any purchase order detail screen.

> **Note:**
>
> Faxing the purchase order is not currently implemented.

Accept PO without printing: To accept a purchase order without advancing to the *Print P/O Window*, you can select *Accept* at the following screens:

Screen	Result
Work with Purchase Order (Header) Screen	The system accepts changes made and returns to the *PO Maintenance Select Prompt Screen*.
Create PO Detail Standard Screen	The system accepts changes made and returns to the *PO Maintenance Select Prompt Screen*.
Purchase Order Summary Screen	The system accepts changes made and returns to the *PO Maintenance Select Prompt Screen*.

If you cancelled one or more lines on a drop ship PO: The system displays an error message when you select *Accept* if you are maintaining a drop ship PO and during PO maintenance you cancelled some, but not all, of the lines on the PO: `D/S PO cannot be accepted with partially cancelled lines. Please cancel all lines.` To complete PO maintenance, you must cancel all of the lines on a drop ship PO.

Updates: The system performs field and table updates through a background processing job (OTHR_ASYNC) when you select *Accept* or *Accept/Fax*. See *Updates During Background Processing* for more information.

Reject Purchase Order

To reject a purchase order, select *Reject* at any of the screens listed above. A pop-up window appears prompting you to confirm. Select *OK* to confirm the rejection and exit the screen; otherwise, select *Exit* to cancel the rejection and return to the previous screen.

> **Note:**
>
> No changes made during this session of PO Maintenance will be recorded/accepted if you select *Reject* to reject.

Approve Purchase Order

Select *Approve* to approve the purchase order. You must have authority to the *Approve Purchase Order (A31)* secured feature to approve a purchase order.

> **Note:**
>
> If you advanced to PO Maintenance from PO inquiry, you cannot approve a purchase order. You need to select the purchase order in PO maintenance in order to approve it, regardless of your secured feature authority.

Cancel Purchase Order

To cancel the entire PO: Select *Cancel PO* to cancel the entire purchase order.

> **Note:**
>
> If a PO line contains a drop ship item, and you use the Order Orchestration Drop Ship interface to process drop ship items for this vendor, you cannot cancel the purchase order using the *Cancel PO* option: `Must cancel drop ship lines individually`.

To cancel individual lines: Select *Cancel* for a detail line to cancel it from the purchase order. The status (Sts field) for the item changes to *C* (canceled), and the On order qty reduces by the number of units canceled.

> **Note:**
>
> If you cancel some, but not all, of the lines on a drop ship PO individually and then select *Accept* to accept the PO maintenance changes, the system displays an error message: `D/S PO cannot be accepted with partially cancelled lines. Please cancel all lines`. To complete PO maintenance, you must cancel all of the lines on a drop ship PO.

Authorizations for drop ship PO: When you cancel a drop ship PO and an authorization exists for the associated order, the system creates a record in the Void Auths table for the authorization amount.

Drop ship pick: When you cancel a drop ship PO, the system also voids the associated drop ship pick.

Order Orchestration Drop Ship interface: If a PO line contains a drop ship item, and you use the Order Orchestration Drop Ship interface to process drop ship items for this vendor, you cannot cancel the PO line unless:

- You have authority to the *Cancel OROB Drop Ship PO (J04)* secured feature.
- The item is a drop ship item, but was processed before the vendor was flagged as OROB Drop Shipping.

If you do not have authority to the Cancel OROB Drop Ship PO (J04) secured feature, the following message displays when you select *Cancel* for a drop ship line: `Use D/S Status option in PO or Order Inquiry to cancel D/S integration PO line`.

Cancellation reason code: The system assigns the *Auto Soldout Cancel Reason (C20)* to the canceled order line(s).

From PO Inquiry or standard Order Inquiry, you can cancel an Order Orchestration drop ship item if you have authority to the secured feature *Order Maintenance Access (A22)*. See *Cancelling Order Orchestration Drop Ship Order Lines* for processing details.

Print P/O Window

Use this window to print the *Purchase Order*.

Emailing the purchase order: Emailing the purchase order as well as printing it is available when:

- the *Email Purchase Order (K80)* system control value is selected, and
- the vendor's *Email P/O* flag is selected, and
- the vendor has a valid *Email* address.

You can override the email address at this window if you would like to send the purchase order to an alternate address. Your entry at this window does not update the email address in the Vendor record.

The purchase order is sent as an attachment to an email, using the *PO Print Program (C64)*. The text in the email is derived from the Purchase Order template set up through *Working with E-Mail Notification Templates (WEMT)*.

> **Note:**
>
> Faxing the purchase order is not currently implemented.

Purchase order status: The status of the purchase order determines whether it is eligible to print.

- All open, held, and suspended purchase orders are eligible to print through this window.
- If the *Print ordered quantity* field on this window is *selected*, closed purchase orders are eligible to print through this window; otherwise, the window does not display an error message, but no purchase order is printed.
- Cancelled purchase orders are not eligible to print through this window, although the window does not display an error message.

Purchase order line status: The status of the purchase order line determines whether it is eligible to print on eligible purchase orders.

- Open, held, and suspended purchase order lines are included on eligible purchase orders that you print.
- If the *Print ordered quantity* field on this window is *selected*, closed purchase order lines are included on purchase orders that you print. If the *Print ordered quantity* field is *unselected*, closed purchase order lines are not included.
- Cancelled purchase order lines are not included on purchase orders that you print.

For more information: See *Completing PO Maintenance*.

How to display this window:

- Select *Accept/Print* at the *Work with Purchase Order (Header) Screen* in purchase order maintenance. You must first select *OK* in purchase order maintenance to accept the purchase order.
- Select *Print* at the *Display Purchase Order Header Screen* in purchase order inquiry.

Field	Description
Purchase order #	The number of the purchase order. Numeric, 7 positions; display-only.
Vendor	The name of the vendor on the purchase order. Alphanumeric, 30 positions; display-only.
Print PO	Controls whether the system prints the *Purchase Order* when you select *OK* at this pop-up window. Valid values are: • *Selected* (default) = print the purchase order. • *Unselected* = do not print the purchase order.
Print ordered quantity	Controls the quantity to print on the *Purchase Order* when you select *OK* at this pop-up window. Valid values are: 1. *Selected* = Print the quantity ordered for each purchase order line. For example, if the order quantity is 10, and 7 units have been received, the purchase order lists a quantity of 10. You need to select this option to print a closed purchase order or include closed purchase order lines. **Note:** The quantity printed is the most recent order quantity on the purchase order line. For example, if the original quantity ordered was 100, but you updated the quantity to 125 in purchase order maintenance, a quantity of 125 prints on the purchase order. • *Unselected* (default) = Print the quantity due for each purchase order line. For example, if the order quantity is 10, and 7 units have been received, the purchase order lists a quantity of 3. If you select this option, the system does not print a closed purchase order.

Field	Description
Email purchase order	Indicates whether to email the purchase order to the vendor, or to simply produce a .PDF file for printing without emailing. This field is included only if: • the *Email Purchase Order (K80)* system control value is selected, and • the vendor's *Email P/O* flag is selected, and • the vendor has a valid *Email* address. Valid values are: • *Selected* (default) = Send the purchase order as a .PDF attachment to the Email address indicated, using the *PO Print Program (C64)*. The text in the email is derived from the Purchase Order template set up through *Working with E-Mail Notification Templates (WEMT)*. This template is available at the company level only, since the purchase order is not related to a specific entity. The .PDF file is also available for printing. • *Unselected* = Generate a .PDF file of the purchase order for printing, and do not send it by email. If you deselect this flag, you will need to clear the Email address field before you accept your entries at this window.
Email address	The email address where the purchase order should be sent. Included only if the Email purchase order flag is selected; see the description above for more information. Optionally, you can override the vendor's email address to send the purchase order to a different address, although overriding the email here does not update the email address stored in the Vendor record. Alphanumeric, 50 positions; required if the Email purchase order flag is selected.

Completing this window: When you complete this window, the system submits the PO_PRINT job. This job:

- Generates the *Purchase Order* using the *PO Print Program (C64)*. If you are not emailing the purchase order; the .PDF file is available at the *Forms Management (My Forms)* screen. Otherwise, it attaches the .PDF file to an email to the vendor's email address as well as making the .PDF file available for printing. The text of the email is derived from the Purchase Order template set up through *Working with E-Mail Notification Templates (WEMT)*.
- Updates the Print date for the purchase order, displayed in purchase order inquiry.
- Writes a PO Message if you are emailing the purchase order, indicating the email address where the purchase order was sent, for example:

```
PO emailed to vendor email ejohnson@example.com
```

> **Note:**
>
> The generation date is not displayed at the *Work with PO Messages Screen*, although it is written to the PO Message table. Also, if the entire message, including the email address, exceeds the maximum message length of 60 positions, it is truncated.

Using Purchase Order Inquiry

Topics in this part:

- *Purchase Order Inquiry (MPOI)* describes the screens you use to review a purchase order on the system.

Purchase Order Inquiry (MPOI)

Purpose: Use purchase order inquiry to review the status, details, and other information about a purchase order.

In this topic:

- *Select Purchase Order for Inquiry Screen*
- *First Display Purchase Order Detail Screen*
- *Second Display Purchase Order Detail Screen*
- *Display Purchase Order Detail Charges Screen*
- *Display Purchase Order Header Screen*
- *Purchase Order Header History Screen*
- *Purchase Order Line History Screen*
- *Purchase Order Overrides Pop-Up Window*
- *Display Purchase Order Actual Charges Screen*
- *Display Vendor Notes Screen*
- *First Display FOB for Purchase Order Screen*
- *Second Display FOB for Purchase Order Screen*

Select Purchase Order for Inquiry Screen

Purpose: Use this screen is used to select a purchase order directly for inquiry; or enter information into any of the selection fields to review a list of purchase orders that closely match your entry.

How to display this screen: Enter *MPOI* in the Fast Path field at the top of any menu or select this option from a menu.

When you enter information at any of these fields, you advance to a Select Purchase Order screen based on the first field that you completed. For example, if you enter a vendor number and a buyer, you advance to the *Select Purchase Order by Vendor Number Screen* because the Vendor field is before the Buyer field.

Field	Description
P/O #	The number assigned to a purchase order. Enter a PO number to advance to the *First Display Purchase Order Detail Screen*. Numeric, 7 positions; optional.

Field	Description
Due date	The date the purchase order is due to be received, based on the PO date and the Lead days from the Vendor/Item record, or a date entered for the PO. Enter a date to advance to the *Select Purchase Order by Due Date Screen*. Numeric, 6 positions (in user date format); optional.
Reference #	An internal reference number that may be stored with the purchase order. Enter a number to advance to the *Select P/O by Reference Number Screen*. Alphanumeric, 15 positions; optional
Vendor (number)	The code assigned to the vendor. Enter a vendor number to advance to the *Select Purchase Order by Vendor Number Screen*. Numeric, 7 positions; optional.
Vendor name	The name of your supplier. Enter a vendor name to advance to the *Vendor Selection Pop-Up Window (Selecting Purchase Orders by Vendor Name)*. Alphanumeric, 30 positions; optional.
Reference	The vendor's reference number. Enter a reference number to advance to the *Select P/O by Vendor Reference Screen*. Alphanumeric, 15 positions; optional.
Item	The vendor's item number. Enter an item code to advance to the *Select Purchase Order by Item/SKU Screen*. Alphanumeric, 20 positions; optional.
Item/Clr Size	The item number and SKU, if applicable. Alphanumeric, 12 positions (item) and three 4-position fields (SKU); optional.
Buyer	A code to identify a person authorized to make purchases. Enter a buyer code to advance to the *Select Purchase Order by Buyer Screen*. Alphanumeric, 3 positions; optional.

First Display Purchase Order Detail Screen

Purpose: Use this screen to review all aspects of a purchase order.

How to display this screen:

- Enter the number of the purchase order at the *Select Purchase Order for Inquiry Screen*, or
- Enter information in one of the selection fields at the *Select Purchase Order for Inquiry Screen*, then *select* a PO at a subsequent Select PO by (fieldname) screen.
- Select *Detail* at the *Display Purchase Order Header Screen*

Field	Description
P/O #	The number assigned to a purchase order. Numeric, 7 positions; display-only.

Field	Description
Vendor	The name and the number of the supplier of the item. Vendor codes are defined in and validated against the Vendor table; see *Working with Vendors (WVEN)*. Alphanumeric, 20 positions; display-only
Buyer	A code that identifies an employee who is authorized to make purchases for your company. Buyer codes are defined in and validated against the Buyer table; see *Working with Buyers (WBUY)*. Alphanumeric, 3 positions; display-only.
Status	The status of the purchase order. Valid values are: • *C* = Cancelled. The purchase order was canceled through P.O. Maintenance; it exists on the system for historical purposes. • *D* = Docked. The purchase order has arrived at the warehouse, but the inventory has not yet been reviewed or received. • *H* = Held. If the purchase order is on hold, you cannot receive it until you approve it through purchase order maintenance. • *O* = Open. You expect to receive the items on the purchase order. • *S* = Suspended. Inventory has been received into suspense through the P.O. Receiving function. At a later point, permanent locations in the warehouse will be determined for these items. • *X* = Closed. All items on the purchase order have been received. Alphanumeric, 1 position; display-only.
Promise (Promise date)	A user-defined date for the expected ship date or promised arrival date. Numeric, 6 positions (in user date format); display-only.
Due (Due date)	The date the purchase order is due to be received, based on the PO date and the Lead days from the Vendor/Item record or manually entered for the PO. Numeric, 6 positions (in user date format); display-only.
Print (Print date)	The date the purchase order was printed. Numeric, 6 positions; display-only.
Cancel (Cancel date)	The date the purchase order will be flagged for cancellation if the items are not received. An auto-cancellation option is available that will produce a list of all items approaching or beyond the specified cancel date. Numeric, 6 positions (in user date format); display-only.
Total cost	The total value of items to be purchased, calculated by the extended price (quantity ordered multiplied by price), plus additional estimated charges and line surcharges (minus any discounts). Expressed in your currency, not the vendor's. Numeric, 20 positions with a 4-place decimal; display-only.
Ln # (Line number)	The purchase order detail line number. You can enter up to 999 lines on one purchase order. Numeric, 3 positions; display-only

Field	Description
Sts (Status)	The status of the purchase order detail line. Valid values are: • *C* = Canceled • *H* = Held • *O* = Open • *S* = Suspended • *X* = Closed Alphanumeric, 1 position; display-only.
Item	A code for an unit of inventory. Item numbers are defined in and validated against the Item table. Item: Alphanumeric, 12 positions; display-only. Description: Alphanumeric, 120 positions; display-only.
SKU	A code that further identifies a unit of inventory by its unique style, such as its color and size. Alphanumeric, three 4-position fields; display only.
UOM (Unit of measure)	A standard by which an item is sold. Typical units of measure include: • *EA* = each • *IN* = inches • *C12* = case of 12 Unit of measure codes are defined in and validated against the Unit of Measure table; see *Working with Units of Measure (WUOM)*. Alphanumeric, 3 positions; display-only.
Qty due (Quantity due)	The quantity remaining to be received from the vendor. Numeric, 7 positions; display-only.
Qty rcv (Quantity received)	The quantity already received from the vendor. PO Receiving updates this field. Numeric, 7 positions; display-only.
	You can select
Qty ord (Quantity ordered)	The quantity originally ordered of the item. Numeric, 7 positions; display-only.
Ext cost (Extended cost)	The total cost for this item. The calculation is: `(Quantity ordered * (Price from the Vendor/Item or Item record + Surcharge)) - Discount` Numeric, 20 positions with a 4-place decimal; display-only.

Screen Option	Procedure
Display PO detail information	Select *Display* for an item to advance to the *Second Display Purchase Order Detail Screen*.
Review receiving history	Select *Receiving* for an item to advance to the *Purchase Receipts History Screen*.

Screen Option	Procedure
View Order Orchestration status information about a drop ship purchase order detail line	Select *DS Status* next to an item to advance to the *Display P/O Drop Ship Screen*, if the item is a drop ship item and you use the *Order Orchestration Drop Ship Integration* to process drop ship items for this vendor. If you have authority to the Order Maintenance Access (A22) secured feature, you can initiate a cancel request for the item from the Display PO Drop Ship screen. If the item is not a drop ship purchase order processed through Order Orchestration, the following message displays: `Selected line has no drop ship purchase order information.`
Work with estimated charges	Select *Estimated Charges* for an item to advance to the *Display Purchase Order Detail Charges Screen*.
Work with vendor item notes	Select *Vendor item notes* for an item to advance to the *Work with Vendor Item Notes Screen*.
Work with line messages	Select *Messages* for an item to advance to the *Work with PO Detail Messages Screen*.
Display PO detail history	Select *History* for an item to advance to the *Display PO Detail History Screen*.
Maintain PO	Select *Maintain* to display the *PO Maintenance - Maintain Detail Screen*. **Note:** If you advance to PO maintenance from PO inquiry, you cannot approve a purchase order. You need to select the purchase order in *Maintaining Purchase Orders (MPOE)*.
Display PO header information	Select *Header* to advance to the *Display Purchase Order Header Screen*.
Display the quantity due or the quantity received	Select *Toggle due/rcv* to switch between fields.
Display actual charges	Select *Charges* to advance to the *Display Purchase Order Actual Charges Screen*.
Display PO header history	Select *History* to advance to the *Purchase Order Header History Screen*.
Display vendor notes	Select *Vendor notes* to advance to the *Work with Vendor Notes Screen*.
Display PO messages	Select *Messages* to advance to the *Work with PO Messages Screen*.

Second Display Purchase Order Detail Screen

Purpose: Use this screen to review items on a purchase order.

How to display this screen: At the *First Display Purchase Order Detail Screen*, select *Display* for an item.

All fields on this screen are display-only.

Field	Description
PO #	The number assigned to this purchase order. Numeric, 7 positions.
Rev # (Revision number)	The number of times a purchase order has been revised. The revision number is increased each time the purchase order is maintained and accepted. When you initially create a purchase order, the revision number is 1. Numeric, 3 positions.
Status	The status of the purchase order. When you first create a purchase order, the status will be *Open* or *Suspended*. Status options: • *Canceled* = The purchase order was canceled through Purchase Order Maintenance; it exists on the system for historical purposes. • *Closed* = All lines on the purchase order have been received through Purchase Order Receiving. • *Held* = The purchase order must be approved through Purchase Order Maintenance before receipts can occur. • *Open* = The purchase order exists on the system awaiting Purchase Order Receipts. • *Suspended* = Inventory has been received into suspense through Purchase Order Receiving. Alphanumeric.
Line #	The purchase order detail line number. There can be up to 999 lines on one purchase order. Numeric, 3 positions; display-only.
Vendor #	The code that identifies the vendor or supplier of an item. See *Working with Vendors (WVEN)*. Numeric, 7 positions.
Status	The status of the purchase order line. Valid values: • Canceled • Held • Open • Suspended • Closed Alphanumeric, display-only.
Item	The item and SKU you are ordering. The description of the item is below. Item: alphanumeric, 12 positions; display-only. SKU: alphanumeric, three 4-position fields; display-only. Description: alphanumeric, 120 positions; display-only.

Field	Description
U/M (Unit of measure)	A standard by which an item is sold. Typical units of measure include: • *EA* = each • *IN* = inches • *C12* = case of 12 Validated against the Unit of Measure table; see *Working with Units of Measure (WUOM)*. Alphanumeric, 3 positions; display-only.
Quantity	Quantity of the item that has been ordered from the vendor. Numeric, 7 positions; display-only.
Transit qty (Transit quantity)	The quantity that the vendor has indicated is in transit from the vendor to you. Numeric, 7 positions; display-only.
Cost	The unit price for this item. Numeric, 13 positions with a 4-place decimal; display-only.
Primary disc (Primary discount)	The primary discount percentage defined for this vendor that is applied to all items purchased. The standing discount for the vendor defaults, but you can override it at the line level or using PO Header Override; see *Purchase Order Overrides Pop-Up Window*. Numeric, 5 positions with a 2-place decimal; display-only.
Surcharge	An additional fee to purchase this item from this vendor. A surcharge is typically added to purchases from a broker. The surcharge for the vendor defaults, but you can override it using PO Header Overrides; see *Purchase Order Overrides Pop-Up Window*. Numeric, 13 positions with a 4-place decimal; display-only.
Ext cst (Extended cost)	The extended cost of this PO detail line, calculated by multiplying the order quantity and the price, adding the surcharge, and subtracting the discount. Numeric, 20 positions with a 4-place decimal; display-only.
Trade % (Discount 1 percentage)	The percentage of the first discount in the Vendor Discount table. The system applies this discount against the unit cost of an item on the purchase order. The resulting dollar amount for this percentage is in the Discount field located below this field. Discount 1 is blank if you have not defined a value in the *Vendor/PO Discount Values (E18)* system control value. The system calculates discounts based on the method from the *Discount calculation method* field in the Vendor Extended table. See *Combined Discount Calculation* and *Tiered Discount Calculation*. Numeric, 11 positions with a 4-place decimal; display-only.

Field	Description
Coop % (Discount 2 percentage)	The percentage of the second discount in the Vendor Discount table. The system applies this discount against the unit cost of an item on the purchase order. The resulting dollar amount for this percentage is in the Discount field located below this field. Discount 2 is blank if you have not defined a value in the *Vendor/PO Discount Values (E18)* system control value. The system calculates discounts based on the method from the *Discount calculation method* field in the Vendor Extended table. See *Combined Discount Calculation* and *Tiered Discount Calculation*. Numeric, 11 positions with a 4-place decimal; display-only.
Special % (Discount 3 percentage)	The percentage of the third discount in the Vendor Discount table. The system applies this discount against the unit cost of an item on the purchase order. The resulting dollar amount for this percentage is in the Discount field located below this field. Discount 3 is blank if you have not defined a value in the *Vendor/PO Discount Values (E18)* system control value. The system calculates discounts based on the method from the *Discount calculation method* field in the Vendor Extended table. See *Combined Discount Calculation* and *Tiered Discount Calculation*. Numeric, 11 positions with a 4-place decimal; display-only.
Discount (Unit discount)	The amount of the first discount that the system subtracts from the unit cost of an item on the purchase order. The system calculates discounts based on the method from the *Discount calculation method* field in the Vendor Extended table. See *Combined Discount Calculation* and *Tiered Discount Calculation*. Numeric, 13 positions with a 4-place decimal; display-only.
Discount (Unit discount)	The amount of the second discount that the system subtracts from the unit cost of an item on the purchase order. The system calculates discounts based on the method from the *Discount calculation method* field in the Vendor Extended table. See *Combined Discount Calculation* and *Tiered Discount Calculation*. Numeric, 13 positions with a 4-place decimal; display-only.
Discount (Unit discount)	The amount of the third discount that the system subtracts from the unit cost of an item on the purchase order. The system calculates discounts based on the method from the *Discount calculation method* field in the Vendor Extended table. See *Combined Discount Calculation* and *Tiered Discount Calculation*. Numeric, 13 positions with a 4-place decimal; display-only. Vendor's information (see *Working with Vendor Items (WVNI)*
Vendor's	The vendor's item code for the item. Alphanumeric, 20 positions; display-only.
U/M (Unit of measure)	The vendor's unit of measure for the vendor's item. Alphanumeric, 3 positions; display-only.
Quantity	The quantity of the item that has been ordered from the vendor, expressed in the vendor's unit of measure. For example, if your unit of measure is eaches and the vendor's unit of measure is cases of 24, the Qty field may contain 48 units and the Quantity field would be 2 (representing the vendor's unit of measure). Numeric, 7 positions; display-only.

Field	Description
Vendor price	The price the vendor charges for the item, expressed in the vendor's currency. Numeric, 13 positions with a 4-place decimal; display-only.
Vnd disc (Vendor discount)	The primary unit discount amount represented in the vendor's currency. Numeric, 13 positions; display-only.
Vnd disc 1 (Vendor unit discount)	The amount of the first discount displayed in the vendor's currency. Calculating discounts in a foreign currency results in inaccurate discount amounts. Numeric, 13 positions with a 4-place decimal; display-only.
Vnd disc 2 (Vendor unit discount)	The amount of the second discount displayed in the vendor's currency. Calculating discounts in a foreign currency results in inaccurate discount amounts. Numeric, 13 positions with a 4-place decimal; display-only.
Vnd disc 3 (Vendor unit discount)	The amount of the third discount displayed in the vendor's currency. Calculating discounts in a foreign currency results in inaccurate discount amounts. Numeric, 13 positions with a 4-place decimal; display-only.
Ext price (Extended price)	The extended price of this PO detail line in the vendor's unit of measure. Calculated by multiplying the price by the quantity ordered. Numeric, 20 positions with a 4-place decimal; display-only.
Prc mthd (Price method description)	The description of the pricing method used for the item on this purchase order. Valid values are: • *Price overridden* = At purchase order maintenance, you specified the price for the item. • *Vendor item price* = The vendor item price defaulted. • *Item standard cost* = The standard cost from the SKU table defaulted. . Unless you override it, the system uses the vendor/item price, if it exists, for the purchase order. If there is no vendor/item price, the system uses the average, standard, or last purchase cost, based on your costing method as described above. Display-only.
Buyer	A code that identifies a person who is authorized to make purchases for your company. The buyer's name is to the right. See *Working with Buyers (WBUY)*. Alphanumeric, 3 positions; display-only.
Ship via	A code that represents a carrier used for shipping merchandise to your company. The description is to the right. See *Working with Purchase Order Ship Via (WPSV)*. Numeric, 2 positions; display-only
Offer (Offer code)	A code for the offer (catalog) in which you will sell the item. See *Working with Offers (WOFR)*. The description is to the right. Alphanumeric, 3 positions; display-only.

Field	Description
Warehouse	A code that represents the warehouse where the item is kept. Validated against the Warehouse table. The description is to the right. Numeric, 3 positions; display-only.
Due date	The date the PO is due to be received, based on the PO date and the Lead days for the vendor item or manually entered in Purchase Order Maintenance. This date is shown in Order Entry, Order Maintenance, and standard or streamlined Order Inquiry. Numeric, 6 positions (in user date format); display-only.
Cancel date	The date the order will be marked for cancellation if the order is not received. See *Printing the PO Auto Cancel Report (MPAC)*. Numeric, 6 positions (in user date format); display-only.
Promise date	A user-defined date that may be used to represent the expected ship date or promised arrival date. Numeric, 6 positions (in user date format); display-only.

Screen Option	Procedure
Review estimated charges	Select *Estimated Charges* to advance to the *Display Purchase Order Detail Charges Screen*.
Update vendor item notes	Select *Vendor Item Notes* to advance to the *Work with Vendor Item Notes Screen*.
Update PO detail messages	Select *P/O detail messages* to advance to the *Work with PO Detail Messages Screen*.

Display Purchase Order Detail Charges Screen

Purpose: Use this screen to review additional charges, such as freight, brokerage, commission, or duty charges, for this purchase order detail line. These charges are for estimating purposes only. You can assign additional charges at purchase order receiving; see *Purchase Order Inquiry (MPOI)*.

You use the *Working With PO Additional Charges (WPAC)* menu option to define PO additional charges. You can enter the estimated charge as a unit cost or a percent to apply against each unit on this purchase order detail line.

How to display this screen:

- At the *First Display Purchase Order Detail Screen*, select *Estimated Charges* for an item.
- At the *Second Display Purchase Order Detail Screen*, select *Estimated Charges*.

Field	Description
P/O #	The number assigned to a purchase order. Numeric, 7 positions; display-only.
Line # (Line number)	The purchase order detail line number. There can be up to 999 lines on one purchase order. Numeric, 3 positions; display-only.

Field	Description
Item	A code that represents a unit of inventory. Alphanumeric, 12 positions; display-only.
Code	A code that represents the estimated charge for to the detail line. Validated against the PO Additional Charge table; see *Working With PO Additional Charges (WPAC)*. Numeric, 2 positions; optional.
Description	Text that describes the charge code. Alphanumeric, 30 positions; display-only.
Unit cost	The unit charge for this purchase order detail line for brokerage, commission, duty, freight, import, surcharge, or other user-defined fees. Actual charges from the vendor for these fees are captured at PO Receiving. The system multiplies the unit cost by the quantity ordered to determine the estimated charge. Numeric, 13 positions with a 4-place decimal; display-only.
Percent	The percentage used to calculate the additional charges on a purchase order detail line. The system multiplies the percentage by the extended price on the purchase order detail line to determine the estimated charge. Actual charges are captured at PO Receiving. Numeric, 5 positions with a 2-place decimal; display-only.

Display Purchase Order Header Screen

Purpose: Use this screen to review information about the purchase order that pertains to the entire purchase order record, such as status, ship-to address, buyer, or offer.

Purchase order download triggers: If the *Create Generic PO Download Triggers (K26)* system control value is *selected*, the system generates a purchase order header (POH) trigger whenever a purchase order is printed, based on the trigger rules defined for the Purchase Order Download (PO_OUT) integration layer job. The PO_OUT integration layer job monitors for purchase order download triggers and generates a *PO Download XML Message (CWPurchaseOrderOut)* to send purchase order information to a remote system. See *Generic Outbound Purchase Order API* in the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1) for an overview.

How to display this screen: At the *First Display Purchase Order Detail Screen*, select *Header*.

Field	Description
P/O #	The number assigned to a purchase order. Numeric, 7 positions.

Field	Description
Ship to	The ship-to information entered for the purchase order. Each option is described below. *Warehouse:* Defaults from the primary warehouse defined in the System Control table. If you do not have a default defined in the System Control table, you must enter the warehouse code. **Note:** You can override the warehouse code for any line on the purchase order. The system tracks the total on order for each item in each warehouse, based on the code entered here or on the detail line. In addition, the warehouse code controls which shipping address prints on the PO or is transmitted in the EDI table. A separate PO prints for each warehouse to each different ship-to address. Numeric, 3 positions. *Customer number/Order number:* Unique numbers the system assigns to customers or orders. The system requires either a customer or order number for drop ship purchase orders. If you enter the customer number, the system does not tie this number to the order or pull the items from the order through to the purchase order. Numeric, 9 positions.
Status	The status of the purchase order. Valid values are: • *Canceled* = The purchase order was canceled through PO Maintenance; it exists on the system for historical purposes. • *Closed* = All lines on the purchase order have been received through PO Receiving. • *Docked* = One or more deliveries against the purchase order have been docked and the purchase order is awaiting receipt. • *Held* = The PO must be approved through PO Maintenance before receipts can occur. • *Open* = At least one line on the PO is awaiting receipt. • *Suspended* = Inventory has been received into suspense through the PO Receiving function. Alphanumeric
Vendor	A unique number to identify the supplier you are purchasing from. Validated against the Vendor table. Numeric, 7 positions.
Vendor name/address	The supplier's name and address. Alphanumeric, 30 positions.

Field	Description
Warehouse/customer	The name and address of the warehouse or the customer, depending on which information you entered. Alphanumeric, 30 positions.
Placed with	The name of the person at the vendor site who took the purchase order originally. Alphanumeric, 30 positions.
Shipping	One line of shipping instructions to print on the purchase order. Alphanumeric, 20 positions.
Buyer	A code that identifies an employee who is authorized to make purchases for your company. Validated against the Buyer table; *Working with Buyers (WBUY)*. Numeric, 3 positions.
Ship via	A code that identifies your preferred shipper, or the shipper agreed upon with the vendor. Validated against the PO Ship Via table; see *Working with Purchase Order Ship Via (WPSV)*. Numeric, 2 positions.
Offer (Offer code)	The code for the offer (catalog) you use to sell this merchandise. Alphanumeric, 3 positions.
Due date	The date the purchase order is due to be received. The due date is the date the operator always sees in Order Entry. Numeric, 6 positions (in user date format).
Cancel date	The date the purchase order will be marked for cancellation if the order is not received. An auto-cancellation option is available that will produce a list of all items approaching or beyond the specified cancel date. Numeric, 6 positions (in user date format).
Promise date	A user-defined date that may be used to represent the expected ship date or promised arrival date. Numeric, 6 positions (in user date format).
Print date	The date the purchase order was printed. Numeric, 6 positions (in user date format).
Type	Indicates whether this purchase order is an initial buy or a reorder. Valid values are: • *Initial Buy* • *Reorder*
Entry date	The date the purchase order was entered. Numeric, 6 positions (in user date format).
Receipt date	The date when the most current receiving activity was performed against this purchase order. Numeric, 6 positions (in user date format).
Approve date	The date the purchase order was approved. Numeric, 6 position (in user date format

Field	Description
Entered by	The ID that identifies the user who entered the order. Alphanumeric, 10 positions.
Received by	A code that identifies the user who received the merchandise. Alphanumeric, 10 positions.
Approved by	A code that identifies the user who approved the purchase order. Alphanumeric, 10 positions.

Screen Option	Procedure
Review purchase order details	Select *Detail* to return to the First Display Purchase Order Detail Screen.
Print the purchase order	Select *Print* to advance to the *Print P/O Window*. **Note:** Faxing the purchase order is not currently implemented.
Review FOB addresses for the purchase order	Select *FOB* to advance to the *First Display FOB for Purchase Order Screen*.
Display actual charges	Select *Act Chgs* to advance to the *Display Purchase Order Actual Charges Screen*.
Review purchase order history	Select *P/O Hist* to advance to the *Purchase Order Header History Screen*.
Review purchase order overrides	Select *P/O Overrides* to advance to the *Purchase Order Overrides Pop-Up Window*.
Update purchase order messages	Select *P/O Messages* to advance to the *Work with PO Messages Screen*.
Display vendor notes	Select *Vendor Notes* to advance to the *Display Vendor Notes Screen*.

Purchase Order Header History Screen

Purpose: Use this screen to review the activity that has taken place for a purchase order at the header level.

How to display this screen: Select *P/O Hist* at the *Display Purchase Order Header Screen*.

Field	Description
P/O #	A unique number to identify the purchase order. Numeric, 7 positions; display-only.
Vendor #	The name and number of the supplier. Alphanumeric, 20 positions; display-only.

Field	Description
B/A	A code indicating whether the history represents a before or after image of the transaction. Values are: • *Before* = information representing the purchase order before the transaction was processed. • *After* = information representing the purchase order after the transaction was processed. Alphanumeric, display-only.
Date	The date when the activity was performed. Numeric, 6 positions; display-only.
User	The user who performed the activity. Alphanumeric, 10 positions; display-only.
Description	A description of the activity that was performed against the purchase order. Alphanumeric, 25 positions; display-only.

Screen Option	Description
Review purchase order line history	Select *Line History* to advance to the Purchase Order Line History screen. See *Display PO Detail History Screen* for screen sample and field descriptions of this screen.

Purchase Order Line History Screen

Purpose: Use this screen to review any activity against the purchase order line since it was created on the system. The system notes each time anything happens to the line (such as, maintenance, receipts, etc.).

How to display this screen: At the *Purchase Order Header History Screen*, select *Line History*.

Field	Description
P/O #	The unique number which identifies the purchase order , and the description of the supplier. Alphanumeric, 20 positions; display-only.
Line #	The number of this line on the purchase order. Numeric, 3 positions, display-only.
Item	The code and description of the item. Item: Alphanumeric, 12 positions; display-only. Description: Alphanumeric, 120 positions; display-only.
B/A	A code indicating whether the history represents a before or after image of the transaction. Values are: • *Before* = information representing the purchase order detail line before the transaction was processed. • *After* = information representing the purchase order detail line after the transaction was processed. Alphanumeric, display-only.

Field	Description
Date	The date when the activity was performed. Numeric, 6 positions; display-only.
User	The user who performed the activity. Alphanumeric, 10 positions; display-only.
Description	A description of the activity that was performed against the purchase order detail line. Alphanumeric, 25 positions; display-only.

Screen Option	Description
Review history for the next detail line of the purchase order	Select *OK*.

Purchase Order Overrides Pop-Up Window

Purpose: Use this window to review overrides that have been made to the Vendor record for this purchase order only.

How to display this screen: At the *Display Purchase Order Header Screen*, select *P/O Overrides*.

Field	Description
Reference #	An internal reference number to store with the purchase order. For example, this might be an internal purchase order number from a preprinted purchase order, or an internal control for departmental purchase orders. Alphanumeric, 15 positions; display-only.
Currency/Rate	The currency of the vendor or broker, and the current currency conversion rate. See *Working with Currency (WCUR)*. Currency: alphanumeric, 3 positions; display-only. Rate: numeric, 13 positions with a 7-place decimal; display-only.
Vendor ref # (Vendor reference number)	The vendor's reference number, such as an alternate order number. Prints on the purchase order. Alphanumeric, 15 positions; display-only.
Terms	A code that represents the payment terms, such as net 30 days. Defaults from the Vendor table, but you can override it in purchase order maintenance. Numeric, 2 positions; display-only.
Discount % (Discount percent)	The discount percent to apply to each item ordered from this vendor. Defaults from the Vendor table, but you can override it in purchase order maintenance. Numeric, 5 positions with a 2-place decimal; display-only.
Surcharge % (Surcharge percent)	The surcharge percentage to add to purchases from this vendor. A surcharge is typically added to purchases from a broker. Defaults from the Vendor table, but you can override it in purchase order maintenance. The surcharge percent is reflected in the cost of each item. Numeric, 5 positions with a 2-place decimal; display-only.

Field	Description
Tax status	The resale or exempt classification, if any, entered in purchase order maintenance. Informational. Alphanumeric, 15 positions; display-only.
Negotiate price	Determines whether prices default for items. • *Selected* = You must enter a price for each item. • *Unselected* = The price automatically defaults for each item from: 1. Vendor/Item quantity break table 2. Vendor/Item table 3. Item table See *Working with Vendor Items (WVNI)*.
Confirming P/O	Indicates whether this is a confirming purchase order. When you print a confirming purchase order, it indicates if it is a confirming document. • *Selected* = The purchase order was already communicated to the vendor, and this is a confirming purchase order. • *Unselected* = This is not a confirming purchase order.

Display Purchase Order Actual Charges Screen

Purpose: Use this screen to review the actual additional charges for the purchase order in terms of brokerage, commission, duty, freight, import, surcharge, or other user-defined fees.

The actual charges are captured at PO Receiving. These may be compared against the estimated charges defined for the PO during PO Maintenance. These charges represent the cumulative charges over all lines on a PO.

How to display this screen: At the *Display Purchase Order Header Screen*, select *Act Chgs*.

Field	Description
P/O # (Purchase order number)	The number assigned to a purchase order. Numeric, 7 positions; display-only or required
Receipt date	The date on which the most current receiving activity was performed against this purchase order. Updated by PO Receiving. Numeric, 6 positions (in user date format); display-only.
Vendor #	The number and name of the supplier. Alphanumeric, 20 positions; display-only.
Charge code	A code that represents a type of additional charge for the purchase order, such as brokerage, commission, duty, freight, import, surcharge, or other user-defined fees. Valid additional charge codes are defined through the PO Additional Charge function; see *Working With PO Additional Charges (WPAC)*. Alphanumeric, 2 positions; display-only.

Field	Description
Description	Description associated with an additional charge for a purchase order detail line, for brokerage, commission, duty, freight, import, surcharge, or other user-defined fees. Alphanumeric, 30 positions; display-only.
Amount	The total dollar value of the actual additional charge for brokerage, commission, duty, freight, import, surcharge, or other user-defined fees. Represents the total for this type of fee across all lines of the purchase order. Updated at PO Receiving. This charge may be compared against the estimated additional charges entered during PO Maintenance. Numeric, 20 positions with a 4-place decimal; display only.

Display Vendor Notes Screen

Purpose: Use this screen to display free-form notes about this vendor. These notes are displayed in PO Inquiry, PO Maintenance, and PO Receiving.

How to display this screen: At the *Display Purchase Order Header Screen*, select *Vendor Notes*.

Field	Description
Note	Free-form text about the vendor. The text can print on purchase orders and reports. These notes are displayed in PO Maintenance, PO Inquiry, and PO Receiving. Select *Next* to view additional lines. Alphanumeric, 60 positions (each line); display only.
Print	Valid values are: • *Selected* = The note will print on purchase orders for the vendor. • *Unselected* = The note will not print on purchase orders for the vendor.

First Display FOB for Purchase Order Screen

Purpose: Use this screen to review vendor FOB records for a specific purchase order.

About FOB Address: The FOB (freight on board) address is the location where title to merchandise being shipped passes from the seller to the buyer. If the FOB address is an Origin type, ownership of the merchandise passes from seller to buyer at the origin of the shipping route, and the buyer is responsible for transportation costs and risk of loss or damage from that point. If the FOB address is a Destination type, ownership of the merchandise passes from seller to buyer at the receiving point for the merchandise, and the seller is responsible for transportation costs and risk of loss or damage until the merchandise reaches its destination.

How to display this screen: Select *FOB* at the *Display Purchase Order Header Screen*.

You cannot change any information on this screen. To change vendor FOB information for a purchase order, advance to the *Work with FOB for Purchase Order Screen* through *Maintaining Purchase Orders (MPOE)* (fast path = *MPOE)*.

Field	Description
Vendor	The vendor number and description for this purchase order. Vendor number: Numeric, 7 positions; display-only. Vendor description: Alphanumeric, 30 positions; display-only.
Type	Identifies the FOB address as either a Destination type or an Origin type. • *Destination* = in this field identifies the FOB address as the location to which merchandise is being shipped (its destination), and indicates that title to the merchandise passes from the seller to the buyer when the merchandise reaches its destination. • *Origin* = in this field identifies the FOB address as the location from which the merchandise is shipped, and indicates that title to the merchandise passes from the seller to the buyer when the merchandise leaves the seller's dock. Alphanumeric, display-only.
City	The city of the FOB address. Alphanumeric, 25 positions; display-only.
St	The state of the FOB address. Alphanumeric, 2 positions; display-only.
Postal cd	The zip code of the FOB address. Alphanumeric, 10 positions; display-only.
Freight terms	A brief description of the freight terms for this FOB address. Alphanumeric, 10 positions; display-only.

Screen Option	Procedure
Display detail information for an FOB address for this purchase order	Select *Display* for a vendor FOB address to advance to the *Second Display FOB for Purchase Order Screen*.

Second Display FOB for Purchase Order Screen

Purpose: Use this screen to review details of a single FOB address for a purchase order.

How to display this screen: Select *Display* for an FOB address on the *First Display FOB for Purchase Order Screen*. See that screen for field descriptions.

Printing Purchase Orders

Topic in this part:

- *Printing Purchase Orders (MPRP)* describes how to make standard print selections (sequence, date, type) and making additional print selections (vendor, buyers, and warehouses) in order to print or email the purchase order.

Printing Purchase Orders (MPRP)

Purpose: Use the Print Purchase Order menu option to print hard copies of purchase orders or to email them to the vendor.

Purchase order status: All open and held purchase orders (status = *O* or *H*) are eligible for printing or emailing through this menu option.

Purchase order download triggers: The *Create Generic PO Download Triggers (K26)* system control value determines whether a purchase order header (POH) trigger is generated whenever a purchase order is printed. See *Generic Outbound Purchase Order API* in the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).for an overview.

> **Note:**
>
> This option does not send purchase order information to Order Broker.

In this topic:

- *Print PO Selection Screen*
- *PO Print Selection Window (Additional Selections)*
- *Completing the Print Process*
- *Purchase Order*

Print PO Selection Screen

How to display this screen: Enter *MPRP* in the Fast path field at the top of any menu or select Print Purchase Order from a menu.

Field	Description
Sequenced by	Indicates how to sort the purchase orders, and which print program to use. Valid values are: • *Sort by P/O #:* the system uses the *PO Print Program for PO Print in PO Sequence (C76)* • *Sort by vendor*: the system uses the *PO Print Program (C64)* Required.

Field	Description
Email PO	Indicates whether to email the purchase order to the vendor, provided the vendor's Email P/O flag is selected and you have specified an email address for the vendor through *Working with Vendors (WVEN)*; otherwise, the system produces the purchase order as a .PDF file for printing but does not email it. This field is available only if the *Email Purchase Order (K80)* system control value is selected. Valid values: • *Selected* (default) = send purchase orders as email attachments to vendors whose Email P/O flags are selected and who have an email address defined, as well as producing the .PDF file; all other emails selected at this screen should be printed only but not emailed. • *Unselected* = do not send any selected purchase orders by email; print only. When you email purchase orders, the purchase order is sent as a .PDF attachment to a plain-text email, using the print program related to your selection at the *Sequenced by* field. Even if a vendor receives multiple purchase orders, each is attached to a separate email. The text in the email is derived from the Purchase Order template set up through *Working with E-Mail Notification Templates (WEMT)*.
Unprinted	This option indicates whether to print or email purchase orders that have been not yet been printed or emailed. Valid values are: • *Selected* = Print (or email) unprinted purchase orders. • *Unselected* = Do not print (or email) unprinted purchase orders.
To restrict the range of unprinted purchase orders to print or email, complete Entry date OR Entry PO fields:	NA
Entry date	If you enter a "from" and "to" date here, the system restricts printing (or emailing) to unprinted purchase orders created on or between these dates. Numeric, 6 positions (in user date format) each field; optional.
Entry PO # (Purchase order number)	If you enter a "from" and "to" purchase order number, the system restricts printing (or emailing) to unprinted purchase orders within this range. Numeric, two 7-position fields; optional.
Revised	This option indicates whether to print or email purchase orders that have been changed since they were printed or emailed. Valid values are: • *Selected* = Print or email revised purchase orders. **Note:** The system selects a purchase order only if it has a Print date earlier than a Revised date. • *Unselected* = Do not print or email revised purchase orders.

Field	Description
To restrict the range of revised purchase orders to print or email, complete Revised date or Revised PO fields:	NA
Revised date	If you enter a “from” and “to” date here, the system restricts printing or emailing to purchase orders revised on or between these dates. Numeric, 6 positions (in user date format) each field; optional
Revised PO # (Revised purchase order number)	If you enter a “from” and “to” purchase order number, the system restricts printing or emailing to revised purchase orders within this range. Numeric, two 7-position fields; optional.
Reprint	This option indicates whether to print or email purchase orders that have been printed or emailed previously. Valid values are: • *Selected* = Print or email purchase orders that have printed or emailed previously. The system selects purchase orders that have a Print date. • *Unselected* = Do not print or email purchase orders that have been printed or emailed previously.
To restrict the range of printed purchase orders to reprint or email, complete the Reprint date or Reprint PO # fields:	NA
Print date (reprint date)	If you enter a “from” and “to” date here, the system restricts printing or emailing to purchase orders printed or emailed on or between these dates. Numeric, 6 positions (in user date format) each field; optional.
Reprint PO # (Reprinted purchase order number)	If you enter a “from” and “to” purchase order number, the system restrict printing or emailing to purchase orders printed or emailed within this range. Numeric, two 7-position fields; optional

Screen Option	Procedure
Accept the settings to print the purchase order	Select *Accept* to create a batch print job. See Completing the Print Process.
Display additional selections	Select *Additional Selections* to advance to the PO Print Selection Window (Additional Selections).

PO Print Selection Window (Additional Selections)

Purpose: Use this window to select the specific vendors, buyers, and/or warehouses for printing or emailing purchase orders.

How to display this screen: Select *Additional Selections* at the Print PO Selection Screen.

Field	Description
Selected vendors	This code identifies a supplier from whom you purchase merchandise. The system restricts printing or emailing purchase orders for the vendors you specify here. Vendor numbers are defined in and validated against the Vendor table; see *Working with Vendors (WVEN)*. You can enter up to 10 vendors. Numeric, ten 7-position fields; optional.
Selected buyers	This code identifies an individual who places purchase orders for you. The system restricts printing or emailing purchase orders for the buyers you specify here. Buyers are defined in and validated against the Buyer table; see *Working with Buyers (WBUY)*. You can enter up to 10 buyers. Alphanumeric, ten 3-position fields; optional.
Selected warehouses	This code identifies the warehouse where the merchandise is to be received. The system restricts printing or emailing purchase orders for the warehouses you specify here. Warehouses are defined in and validated against the Warehouse table; see *Creating and Maintaining Warehouses (WWHS)*. You can enter up to 10 warehouses. Numeric, ten 3-position fields; optional.

Completing the Print Process

Accepting and printing POs: To accept and print or email the Print PO selections, select *Accept* at the *Print PO Selection Screen*. The system generates a batch print job (*PO_PRINT*) and displays a message. This job:

- Generates the *Purchase Order* using the *PO Print Program for PO Print in PO Sequence (C76)* if you selected *Sort by P/O #;* otherwise, the system uses the *PO Print Program (C64)* if you selected *Sort by vendor*.
- If you are not emailing the purchase order; the .PDF file is available at the *Forms Management (My Forms)* screen. Otherwise, it attaches each purchase order as a .PDF file to a separate email to the vendor's email address. The text of the email is derived from the Purchase Order template set up through *Working with E-Mail Notification Templates (WEMT)*.
- Updates the Print date for the purchase order, displayed in purchase order inquiry.
- Writes a PO Message if you are emailing the purchase order, indicating the email address where the purchase order was sent. The generation date is not displayed at the *Work with PO Messages Screen*, although it is written to the PO Message table.

> **Note:**
>
> When the purchase order is printed, a sequence number that is assigned to each line prints rather than the actual purchase order line number. This prevents a vendor from seeing gaps in the line numbers, which can occur if a purchase order has canceled lines or has been partially received.

Printing Purchase Order Reports

Topics in this part:

- *Printing the Open PO Listing By Vendor Report (MPPO)* explains how to generate this report.
- *Printing the PO Auto Cancel Report (MPAC)* explains how to generate the PO Auto Cancel reports.
- *Printing the Purchase Order Expected Delivery Listing (PEXD)* explains how to generate the PO Expected Delivery report.

Printing the Open PO Listing By Vendor Report (MPPO)

Purpose: The Open PO Listing By Vendor report lists purchase orders that have not been received in your warehouse. The report sorts by vendor number, then by descending entry date, and then by ascending PO number.

Print Open PO's By Vendor Screen

How to display this screen: Enter *MPPO* in the Fast path field at the top of any menu, or select Print Open PO's By Vendor from a menu.

Field	Description
Starting due date	The beginning date of the time span you want the system to search for open PO's. For example, if you wanted to search for open PO's throughout the first week of July, you'd fill in 070197 (July 1) in this field. Numeric, 6 positions (in user date format); optional.
Ending due date	The ending date of the time span you want the system to search for open PO's. For example, if you wanted to search for open PO's throughout the first week of July, you'd fill in 070797 (July 7) in this field. Numeric, 6 positions (in user date format); optional.

How to print this report: Select *OK* to select all open POs, or enter in the date fields to select POs by due date. The system generates the *Open PO’s by Vendor Report* according to your selections and returns you to a menu.

Printing the PO Auto Cancel Report (MPAC)

Purpose: The Purchase Order Auto Cancel report provides a listing of purchase orders that have been flagged for cancellation.

Setting the cancel date for a PO: At the *PO Maintenance - Change PO Detail Screen*, enter the Cancel date (which must be greater than the current date).

> **Note:**
>
> There is currently no function that automatically cancels purchase orders flagged for cancellation.

PO Auto Cancel Date Selection Pop-Up Window

How to display this screen: Enter *MPAC* in the Fast Path field at the top of any menu or select this option from a menu.

Completing this window: Complete the latest cancel date to include on the report and Select *Accept*. The system automatically submits a batch job (*POAUTO_CAN*) and generates the *Purchase Order Auto Cancel Report*.

Printing the Purchase Order Expected Delivery Listing (PEXD)

Purpose: Use the Print Expected Delivery Listing menu option to generate the *PO Expected Delivery Report*. This report displays purchase order lines by warehouse and vendor that are due to be received within a specified date range.

PO Expected Delivery List Prompt Screen

Use this screen to generate the *PO Expected Delivery Report*.

How to display this screen: Enter *PEXD* in the Fast path field at the top of a menu or select Print Expected Delivery Listing from a menu.

Field	Description
PO due date range	The date range you wish to use to generate the PO Expected Delivery report. Enter a “from” date in the first field and a “to” date in the second field. The “from” date must be earlier than the “to” date. The system allows you to enter a “to” date that is greater than the current date so that you can review inventory that will be arriving in the future. Numeric, 6 positions (in user date format); required if a PO # is not defined.
PO #	The purchase order number for which you wish to generate the PO Expected Delivery report. Purchase order numbers are defined in and validated against the PO Header table. Numeric, 7 positions; required if a PO due date range is not defined.
Print SKU detail (Y/N)	Indicates if you wish to include SKU information on the PO Expected Delivery report. Valid values: *Selected* = Include SKU information on the report. The system includes the SKU code and SKU description for each item whose due date falls within the report’s date range. *Unselected* (default) = Do not include SKU information on the report. The system lists each item whose due date falls within the report’s date range. If the item is a SKU item, the system does not indicate which SKU of the item is expected to be delivered.

Completing this screen:

1. Enter a PO due date range or PO number.

2. Indicate if you wish to include SKU information on the PO Expected Delivery report.
3. Select *Submit*.
4. If the Print SKU detail field is *Selected*, the system submits the *EXPDLVSKU* job and generates the *PO Expected Delivery Report* with SKUs.
5. If the Print SKU detail field is *Unselected*, the system submits the *EXPDLV* report and generates the *PO Expected Delivery Report* without SKUs.

Performing Inventory Analyses

Topics in this part:

- *Using Inventory Inquiry (DINI)* describes how to use the Inventory Quantity Inquiry menu option to review inventory information for items and SKUs.
- *Printing Item Sales Analysis Reports (MISA)* includes how to access this function, how to set up the report, and a sample report.
- *Printing Item Stock Status Reports (MISS)* includes how to access this function, how to set up the report, and a sample report.
- *Inventory Inquiry by Item (IIQI)* describes how to review order activity on screen for a group of SKUs sharing the same first SKU element.
- *Item Availability API* describes how the system responds to requests for item availability about and item or group of items.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Using Inventory Inquiry (DINI)

Purpose: Inventory inquiry allows you to review on hand quantities in each warehouse and in each location in a warehouse. This function can be used by several departments within your organization and provides a way to display item/SKU information quickly.

Other options: You can use the following additional menu options for inventory inquiry:

- *Inventory Inquiry by Item (IIQI)*: to review item information organized by the base item and the first SKU element
- *Inventory Status Inquiry (ISIQ)*: to review order activity for any item or SKU broken out by offer

In this topic:

- *Inventory Quantity Inquiry Prompt Screen*
- *Item/SKU Selection Screen*
- *Display Item/Warehouse Information Screen*
- *Display Inventory Warehouses Screen*
- *Display Inventory Locations Screen*
- *Inventory On Hand by Location Selection Screen*
- *Inventory On Hand by Location Screen*
- *Display Open Purchase Orders Screen*

- *Display Item Warehouse History Screen*
- *Display Item Screen*
- *Display SKU (Base Information) Screen (Non-SKU'ed Item)*
- *Display SKU - 1 of 2 (With Overrides) Screen*
- *Display SKU - 2 of 2 (With Overrides) Screen*

Inventory Quantity Inquiry Prompt Screen

Purpose: Use this screen to enter information for the Item/SKU/Warehouse that you want to review.

How to display this screen: Enter *DINI* in the Fast Path field at the top of any menu.

Using this screen:

- Use the top portion of the screen to enter warehouse, item and SKU information for inquiry. You advance to the *Display Item/Warehouse Information Screen*. The *Default Warehouse (A04)* from the System Control table defaults.
- If you enter only the base item code and not a specific SKU for a SKU'ed item, the quantity information you see will be the sum of all SKUs for the item.
- Use the lower portion of the screen to scan quickly for items by class, item status, item description, buyer, department, vendor, SKU status, SKU description, compatibility, or category, or a combination of these fields. You advance to the *Item/SKU Selection Screen*.

Field	Description
Class	A code to identify a group of items. Item class codes are used as a high-level method to sort inventory, define information templates at the item class level, assign city/state restrictions, and assign customer class restrictions, and are defined in and validated against the Item Class table; see *Working with Item Classes (WICL)*. Alphanumeric, 3 positions; optional.
Item Status	A code that represents an item's status, such as obsolete, discontinued, etc. You can define this code at the item or the SKU level. Item status codes are defined in and validated against the Item Status table; see *Working with Item Status (WIST)*. Alphanumeric, 1 position; optional.
Item description	The description of the item. You can enter any portion of the description. Alphanumeric, 120 positions; optional.
Buyer	A person authorized to make purchases. Buyer codes are defined in and validated against the Buyer table; see *Working with Buyers (WBUY)*. Alphanumeric, 3 positions; optional.
Department	The department to which the item belongs. Department codes are defined in and validated against the Long SKU Department table; see *Working with Long SKU Departments (WLSD)*. Numeric, 4 positions; optional.
Vendor	The supplier of an item. Vendor numbers are defined in and validated against the Vendor table; see *Working with Vendors (WVEN)*. Numeric, 7 positions; optional.

Field	Description
SKU Status	A code that represents a SKU's status, such as obsolete, discontinued, etc. You can search for an item through either its item or SKU status. The status might differ at the item and SKU level if, for example, you discontinue the "Green" SKU for the base item "Sweater." All other SKUs will have the status you defined at the base item level, but you assign the green sweater a discontinued SKU status in addition to the defined item status. This SKU status now overrides the base item status throughout the system. SKU status codes are defined in and validated against the Item Status table; see *Working with Item Status (WIST)*. Alphanumeric, 1 position; optional.
SKU description	The description of the SKU. You can enter any portion of the description. Alphanumeric, 40 positions; optional.
Category	A category assigned to the item to classify and group similar items. The Item Category is a level below the Item Class. Validated against the Item Category table; see *Working with Item Category Codes (WITG)*. Alphanumeric, 4 positions; optional.
Compatibility	A code assigned to items/SKUs to identify them as compatible items. You might assign a compatibility code of IBM, for example, to all IBM products such as a PC, printer, etc., to indicate that these items work together. The compatibility code is a user-defined code that is not validated by the system. Alphanumeric, 3 positions; optional.

Item/SKU Selection Screen

Purpose: Use this screen to select a specific item/SKU for inventory inquiry.

How to display this screen: Complete scanning information on the lower portion of the *Inventory Quantity Inquiry Prompt Screen*

Selecting an item: You can use the fields in the top portion of this screen to scan further for an item, or you can select an item by *selecting* it. See *Inventory Quantity Inquiry Prompt Screen* for field descriptions.

Screen Option	Procedure
Select an item	*Select* an item to advance to the *Display Item/ Warehouse Information Screen*.
Display item details	Select *Item Details* for an item to advance to the *Display Item Screen*.
Display SKU details	Select *SKU Details* for a non-SKU'd item to advance to the *Display SKU (Base Information) Screen (Non-SKU'ed Item)*; or select *SKU Details* for a SKU'd item to advance to the *Display SKU - 1 of 2 (With Overrides) Screen*.

Display Item/Warehouse Information Screen

Purpose: Use this screen to review information for an item/SKU in the warehouse.

How to display this screen:

- *Select* an item at the *Item/SKU Selection Screen*
- Enter a valid item and warehouse number at the *Inventory Quantity Inquiry Prompt Screen*
- Select *Display Info* at the Display Inventory Warehouses Screen, the Display Inventory Locations Screen, the Inventory On Hand by Location Selection Screen, or the Inventory On Hand by Location Screen

All fields are display-only.

Field	Description
Item description (unlabeled field)	The description of the item. Alphanumeric, 120 positions; display-only.
Item	A code to identify a unit of inventory. Alphanumeric, 12 positions; display-only.
SKU unlabeled field to the right of the item	The item's unique characteristics, such as its color and size. Alphanumeric, three 4-position fields; display-only.
SKU description unlabeled field below the item description	The description of the SKU, if this is a SKU'ed item. Alphanumeric, 40 positions; display-only.
U/M Unit of measure	The multiples in which you buy the item from the vendor. See *Working with Units of Measure (WUOM)*. Alphanumeric, 3 positions; display-only.
Item status	The *Status* for the SKU, if any; otherwise, the *Status* for the item, if any. The description is to the right. Alphanumeric, 1 position; display-only.
Whse Warehouse	A code that represents the warehouse where the item is stored. Warehouse codes are defined in and validated against the Warehouse table; see *Creating and Maintaining Warehouses (WWHS)*. Numeric, 3 positions; display-only.
Location	The "primary primary" location, which is stored in the *Primary location* field in the SKU table. The location code represents the area within the warehouse that contains the item/SKU. Typically, the location code is composed of a single alphanumeric character for Zone, and two numbers each for Aisle, Shelf, and Bin. For instance, the location A010201 indicates: `Zone Aisle Shelf Bin` `A 01 02 01` See *Creating and Maintaining Locations (WLOC)*. Alphanumeric, 7 positions; display-only.

Field	Description
Buyer	This code identifies the person who purchased this item from the vendor. Validated against the Buyer table (see *Working with Buyers (WBUY)*), and used primarily for reporting purposes. It does not default on POs. Alphanumeric, 3 positions; display-only.
Short SKU	The short SKU code for the item/SKU, as defined in the SKU table. The system assigns the short SKU number when the item/SKU is created using the next number available in the Short SKU (A12) number assignment value. Numeric, 7 positions; display-only.
Offer	The code for the offer (catalog) where the item currently appears. You use the *Create Item Offer Screen* or the *Create SKU Offer Screen* to assign an item or SKU to an offer. Defaults from the most current SKU/offer with a current price, if any; otherwise, it defaults from the most current item/offer with a current price. If there is no current item/offer or SKU offer, the system displays a message: `NO CURRENT OFFER` Alphanumeric, 3 positions; display-only.
Page	The Page number for the displayed SKU/offer or item/offer, as specified at the *Create Item Offer Screen* or the *Create SKU Offer Screen* Numeric, 5 positions; display-only.
Offer price	The price at which you are selling the item or SKU in this offer before applying any discounts. The price defaults from the offer. Numeric, 13 positions with a 2-place decimal; display-only.
Vendor	The primary vendor or supplier of the item, as defined in the Item table. Vendor codes are defined in and validated against the Vendor table; see *Working with Vendors (WVEN)*. Numeric, 7 positions; display-only.
Weight	The *Ship weight* for the SKU, if any; otherwise, the *Ship wgt. (Shipping weight)* for the item, if any. Numeric, 7 positions with a 3-place decimal.
Kit type	Identifies a type of kit or set item. Defaults from the *Kit type* for the item. The description is to the right. Alphanumeric, 1 position.
S/O control	The *S/O control (Soldout control)* code, if any, assigned to the item or SKU. The description is to the right. Soldout control code: alphanumeric, 2 positions; display-only. Description: alphanumeric, 30 positions; display-only.
On hand	The number of units of this item in all locations in this warehouse. Numeric, 7 positions; display-only.

Field	Description
On order	The total quantity of this item in this warehouse that is due to be received on open purchase orders. This quantity increases when you enter a purchase order and decreases when you receive a purchase order. If you receive purchase orders into suspense, the suspended quantity remains in this total until you place the suspended stock. The *Purchase Order Layering* process updates this total if the *UPDATE_ON_ORDER_FROM_PO_LAYERING* property is set to TRUE. However, you should leave this property set to FALSE if you use the *Enterprise Order Integration (Future Receipts and Active PO/Pre-Order Processing)*. If you use the *Enterprise Order Integration (Future Receipts and Active PO/Pre-Order Processing)*, the on-order quantity for active purchase order items is the same as the *PO On Order* quantity minus the *PO Receipts* quantity. Numeric, 7 positions; display-only.
Next exptd delivery (Next expected delivery)	The date that you expect to receive this item from your vendor; this is the date from the PO Layering table. **Note:** If no entry exists in the PO Layering table or if the PO Layering record has a quantity of zero, then a next expected PO date does not display. This date is displayed for drop ship items only if the *Assign Drop Ship Expected Ship Date (I59)* system control value is selected. Numeric, 6 positions (in user date format); display-only.
Reserved	The quantity of this item/SKU in this warehouse that is reserved for existing orders. This total increases through immediate, batch, and interactive reservation, and decreases through confirmation or pick void/reprint. Numeric, 7 positions; display-only.
All whses (All warehouses)	The total number of units of this item across all warehouses. Numeric, 7 positions; display-only.
Last receipt date	The most recent date when you received the item into the warehouse. Does not update when you receive the item into a different warehouse. Numeric, 6 positions (in user date format); display-only.
Backorder	The quantity of the item/SKU in this warehouse that is currently on open orders but not available in your warehouse. Numeric, 7 positions; display-only.
S/H reserved	The quantity of this item/SKU in this warehouse that is reserved and flagged for some type of special handling, such as monogramming, hemming, etc. This total increases through reservation of items/SKUs assigned a special handling code in order entry or maintenance, and decreases through confirmation or pick void/reprint. Numeric, 7 positions; display-only.

Field	Description
Out of stock date	The last date the on hand level for this item went to zero. Numeric, 6 positions (in user date format); display-only.
Protected	The quantity of this item or SKU that is protected from immediate or batch reservation across all locations in this warehouse. The system reserves this inventory only through *Working with Interactive Reservation (MIRV)*, which is used for the manual disbursement of large wholesale orders or preferred mail order customers. Numeric, 7 positions; display-only.
SKU open	The total units remaining to be shipped for all open order detail lines, including any quantity reserved and quantity backordered. **Reset:** You can use the *Reset SKU Open Order Quantity (MRSO)* option to reset this quantity if the total in the SKU table is incorrect. Numeric, 7 positions; display-only.
Out of stock freq (Out of stock frequency)	Incremented whenever the on-hand level for this item or SKU reaches zero. Numeric, 7 positions; display-only.
Available	The quantity of this item or SKU currently available to sell in this warehouse. This quantity includes only reservable locations, not locations defined as defective or return to-vendor. Item availability is calculated as follows: `On hand - Protected - Reserved - Reserve Transfer - Backordered = Quantity available` Numeric, 7 positions; display-only.
SKU future	The number of units needed to fulfill future orders. Normally, you would run the Evaluate Future Orders periodic function daily to evaluate each order detail line marked as a "future order." This function calculates arrival date as described below and determines if orders should be moved to open and reserved (Immediate Reservation) or open and backordered. Arrival Date calculation: `Arrival date - Reservation Lead Days (from system control value) = Date` If the resulting date is today's date or earlier, the system attempts to reserve inventory. See the *Reservation Lead Days (B27)* system control value. Numeric, 7 positions; display-only.
Open D/S	The total quantity on open drop-ship orders. **Reset:** You can use the *Reset SKU Open Order Quantity (MRSO)* option to reset this quantity if the total in the SKU table is incorrect. Numeric, 7 positions; display-only.
Pickable	The total quantity of pickable stock in this warehouse. The pickable quantity is equal to the sum of all on hand quantity in all pickable locations in the warehouse. Numeric, 7 positions; display-only.

Field	Description
SKU - susp (SKU suspended)	The total quantity received but not yet placed into a specific location. Increases through purchase order receiving and decreases through purchase order suspense placement. Numeric, 7 positions; display-only.
Recv'd (Received)	The number of units received in this warehouse. • *MTD* = Month to date • *YTD* = Year to date • *LTD* = Life to date These totals increase through receiving (not suspense placement). Numeric, 7 positions each; display-only.
Issued	The total number of units shipped from this warehouse. • *MTD* = Month to date • *YTD* = Year to date • *LTD* = Life to date These totals increase through billing. Increases occur for drop ship, variable sets, and sets. Returns do not decrease this number. If you ship merchandise without affecting inventory (e.g., express bill), this field does not update. Numeric, 7 positions each; display-only.
Retn'd (Returned)	The total number of units that have been returned by customers into this warehouse. • *MTD* = Month to date • *YTD* = Year to date • *LTD* = Life to date. These update through order or return authorization processing. Numeric, 7 positions each; display-only.
Adjusted	The total number of inventory adjustments that have been made through A type inventory transactions only. • *MTD* = Month to date • *YTD* = Year to date • *LTD* = Life to date. The net value is indicated. For example, if you adjust one location up 10 units, and another location down 3, the total adjusted quantity is 7. Numeric, 7 positions each; display-only.
Active PO	Indicates whether this is an active purchase order item for which you can accept orders before you expect to have inventory to fulfill. The periodic functions which are part of the *Enterprise Order Integration (Future Receipts and Active PO/Pre-Order Processing)*, set this flag and handle updates and orders for active purchase order items that are fulfilled through the integration with Order Orchestration. Possible settings: • *selected* = This is an active purchase order item, and orders will be submitted to Order Orchestration as inventory becomes available. • *unselected* = This is not an active purchase order item. This flag is unselected at item creation, and you cannot change its setting at a screen. Only the periodic functions mentioned above update this flag. Display-only.

Field	Description
PO On Order	The total quantity on purchase orders for an active purchase order item. From the RMS On-order quantity, as set by the OCDSFA periodic function. Used to determine the maximum number of active purchase order units allowed on orders before selling out the item. This quantity does not decrease based on the PO Receipts quantity; however, the PREORDER or ACTPO periodic function sets this quantity to 0 if the PO Receipts quantity is greater than or equal to the PO On Order quantity, indicating that all open units of the active purchase order item have been received on purchase orders, and the item is no longer eligible for active PO processing. See *Enterprise Order Integration (Future Receipts and Active PO/Pre-Order Processing)* for more information. Numeric, 7 positions each; display-only.
PO Receipts	The total quantity received on purchase orders for an active purchase order item. From the RMS Receipt quantity, as set by the OCDSFA periodic function. Used to determine the number of units of an active purchase order item to release to Order Orchestration for fulfillment. See *Enterprise Order Integration (Future Receipts and Active PO/Pre-Order Processing)* for more information. Numeric, 7 positions each; display-only.
PO Updated	The most recent date when active purchase order information was updated through *Enterprise Order Integration (Future Receipts and Active PO/Pre-Order Processing)*. From the RMS Update Date. Date; display-only.
Released Qty	The total quantity of an active purchase order item that has been released to Order Orchestration for fulfillment. From the RMS Released quantity. See *Enterprise Order Integration (Future Receipts and Active PO/Pre-Order Processing)* Numeric, 7 positions each; display-only.

Screen Option	Procedure
Display inventory warehouse information	Select *Whses/Item* to advance to the *Display Inventory Warehouses Screen*.
Display inventory location information	Select *Locs/Item* to advance to the *Display Inventory Locations Screen*.
Display inventory on hand by location	Select *On hand by loc* to advance to the *Inventory On Hand by Location Selection Screen*.
Display open purchase orders	Select *Open POs* to advance to the *Display Open Purchase Orders Screen*.
Display components	Select *Display Components* to advance to the Work with Set (Variable, etc.) screen. If this is a set item, you advance to the appropriate screen based on the type of set: • *Work with Set Component Items Screen* • *Work with Variable Set Components Screen*
Display item warehouse history	Select *History* to advance to the *Display Item Warehouse History Screen*.

Display Inventory Warehouses Screen

Purpose: Use this screen to review quantity information for an item/SKU across all warehouses.

How to display this screen: Select *Whses/Item* at the *Display Item/Warehouse Information Screen*, the *Display Inventory Locations Screen*, the *Inventory On Hand by Location Selection Screen*, or the *Inventory On Hand by Location Screen*. All fields are display-only.

Field	Description
Item	A user-defined code that represents a unit of inventory. Alphanumeric, 12 positions; display-only.
Warehouse	A code that represents the warehouse. Warehouse codes are defined in and validated against the Warehouse table. See *Creating and Maintaining Warehouses (WWHS)*. Numeric, 3 positions; display-only.
On hand	The number of units of this item across all locations in this warehouse. Numeric, 7 positions; display-only.
Available	The quantity of this item currently available to sell in the designated warehouse. Takes into account only reservable locations (not locations defined as defective or return to-vendor). Item availability is calculated as follows: `On hand - Protected - Reserved - Reserve Transfer - Backordered = Quantity available` Numeric, 7 positions; display-only.
Pickable	The total quantity of pickable stock in this warehouse. The pickable quantity is equal to the quantity on hand minus the quantity printed. Numeric, 7 positions; display-only.
On order	The total quantity of this item in this warehouse that is due to be received on open purchase orders. This quantity increases when you enter a purchase order and decreases when you receive a purchase order. If you receive purchase orders into suspense, the suspended quantity remains in this total until you place the suspended stock. If you use the *Enterprise Order Integration (Future Receipts and Active PO/Pre-Order Processing)*, the PREORDER periodic function sets the on-order quantity for active purchase order items to the *PO On Order* quantity minus the *PO Receipts* quantity. Numeric, 7 positions; display-only.

Screen Option	Procedure
Display buyer information	Select *Buyer Info* to return to the *Display Item/Warehouse Information Screen*, where buyer information is displayed.

Screen Option	Procedure
Display inventory location information	Select *Locs/Item* to advance to the *Display Inventory Locations Screen*.
Display inventory on hand by location	Select *On hand by Location* to advance to the *Inventory On Hand by Location Selection Screen*.
Display open purchase orders	Select *Open POs* to advance to the *Display Open Purchase Orders Screen*.
Display components	Select *Display Components* to advance to the Working with Set (Variable, Finished good, etc.) screen. See Working with Sets. **Note:** Select this option only for items identified as a set, finished good, or variable set.

Display Inventory Locations Screen

Purpose: Use this screen to review item location information for the specified item or SKU and warehouse.

How to display this screen: Select *Locs/Item* at the *Display Item/Warehouse Information Screen*, *Display Inventory Warehouses Screen*, the *Inventory On Hand by Location Selection Screen*, or the *Inventory On Hand by Location Screen*. All fields are display-only.

Field	Description
Item	A code that represents a unit of inventory. Item codes are defined in and validated against the Item table. Alphanumeric, 12 positions; display-only.
Warehouse	The code and description of the warehouse. Warehouse codes are defined in and validated against the Warehouse table. See *Creating and Maintaining Warehouses (WWHS)*. Code: numeric, 3 positions; display-only. Description: alphanumeric, 30 positions; display-only.
Location	A code representing the area within the warehouse that contains the item/SKU. Typically, the location code is composed of a single alphanumeric character for Zone, and two numbers each for Aisle, Shelf, and Bin. For instance, the location A010201 indicates: `Zone Aisle Shelf Bin` `A 01 02 01` Alphanumeric, 7 positions; display-only.

Field	Description
Location type	A code that defines the type of location. Valid values are: • *Primary* = The primary, or main location where the item is picked. The system does not delete a primary item/location record when the on-hand quantity equals zero. • *Secondary* = Typically, you would use a secondary location for storage when the primary location is full. The system allocates from a secondary location when the total order quantity cannot be filled from the primary location. The system allocates from both the primary and secondary locations when neither location contains enough stock to fulfill the entire order. You can use secondary locations to replenish primary locations. • *Bulk* = Typically, you would use a bulk location to store unbroken lots or cartons. Bulk locations serve as the replenishment source for primary locations. • *Temporary* = Typically, you would use a temporary location to place merchandise that you want recognized as received before you have assigned a permanent location. A temporary location cannot exist without at least one item/location record associated with it. When stock is moved into a temporary location, the system creates an item/location record. When the on-hand in the item/location reaches zero, the system will delete the location and the item/location record. **Note:** Order Administration will not allocate merchandise from a temporary location even if the location is defined as pickable. In order to allocate stock, you must move the merchandise to a non-temporary, pickable location. Display-only.
Maximum	The total unit quantity of the item to keep in this location. Numeric, 7 positions; display-only.
Minimum	The least amount of inventory on hand for this item/SKU. Numeric, 7 positions; display-only.
On hand	The number of units of this item in this location. Numeric, 7 positions; display-only.
Printed	The total quantity printed on an open (unconfirmed) pick slip for the item in this location. Numeric, 7 positions; display-only
Pending	The total quantity of the item in this location with a pending batch inventory transaction or work order. Numeric, 7 positions; display-only.
Pickable	A code indicating whether inventory can be picked from the location. • *Selected* = Inventory can be picked from the location. • *Unselected* = Inventory cannot be picked from the location. Bulk locations, or locations where you keep defective merchandise, might be defined as non-pickable.
Placement dt (Placement date)	The date when you first placed the item in this location through purchase order receiving, a customer return, or an adjustment. Numeric, 6 positions (in user date format); display-only.

Screen Option	Procedure
Display buyer information	Select *Buyer Info* to return to the Display Item/Warehouse Information Screen, where buyer information is displayed.
Display inventory warehouse information	Select *Whses/Item* to advance to the Display Inventory Warehouses Screen.
Display inventory on hand by location	Select *On hand by Location* to advance to the Inventory On Hand by Location Selection Screen.
Display open purchase orders	Select *Open POs* to advance to the Display Open Purchase Orders Screen.
Display components	Select *Display Components* to advance to the Working with Set (Variable, Finished good, etc.) screen. See Working with Sets.

Inventory On Hand by Location Selection Screen

Purpose: Use this screen to review the locations that are available for inquiry.

How to display this screen: Select *On hand by Location* at the Display Item/Warehouse Information Screen, the Display Inventory Warehouses Screen, or the Display Inventory Locations Screen. All fields are display-only.

Field	Description
Warehouse	A code that represents the warehouse, validated against the Warehouse table. See Creating and Maintaining Warehouses (WWHS). Numeric, 3 positions; display-only.
Location	A that represents a warehouse location where merchandise is stored. The warehouse location code can consist of a zone/aisle/shelf/bin combination, or it can be any user-defined code. The location code prints on picks slips and reports. *Example:* The location A010201 indicates: `Zone Aisle Shelf Bin` `A 01 02 01` Alphanumeric, 7 positions; display-only.
Type	A code that defines the type of location. Valid values are: • *P* = Primary. The primary, or main location where the item is picked. The system does not delete a primary item/location record when the on-hand quantity equals zero. • *S* = Secondary. Typically, you would use a secondary location for storage when the primary location is full. The system allocates from a secondary location when the total order quantity cannot be filled from the primary location. The system allocates from both the primary and secondary locations when neither location contains enough stock to fulfill the entire order. You can use secondary locations to replenish primary locations. • *B* = Bulk. Typically, you would use a bulk location to store unbroken lots or cartons. Bulk locations serve as the replenishment source for primary locations.

Field	Description
	• *T* = Temporary. Typically, you would use a temporary location to place merchandise that you want recognized as received before you have assigned a permanent location. A temporary location cannot exist without at least one item/location record associated with it. When stock is moved into a temporary location, the system creates an item/location record. When the on-hand in the item/location reaches zero, the system will delete the location and the item/location record. **Note:** Order Administration will not allocate merchandise from a temporary location even if the location is defined as pickable. In order to allocate stock, you must move the merchandise to a non-temporary, pickable location. Alphanumeric, 1 position; display-only.
Zone/Aise/Shelf/Bin #	If your warehouse locations consist of a warehouse zone, aisle, bin number, and shelf number combination, separate fields are provided for these values. • *Zone* = the warehouse zone where the location is situated. Assigning zone codes provides for inventory analysis reporting by zone. Zone codes are also used to sort pick slips when the Cart Bin Picking method is used. • *Aisle* = the warehouse aisle of the location. • *Shelf* = the location's shelf number within the aisle. • *Bin* = the location's bin number on the shelf. *Example:* The location A010201 indicates: `Zone Aisle Shelf Bin` `A 01 02 01` Alphanumeric, 7 positions; display-only.
Units	The total number of units that can fit in the location. Numeric, 7 positions; display-only.
Weight	The total weight the location can hold, expressed in pounds. Numeric, 7 position with a 3-place decimal; display-only.
Volume	The cubic capacity of the location. The volume calculation multiplies the height, by the length, by the width of the location. Numeric, 7 positions; display-only.

Screen Option	Procedure
Display on hand information	*Select* a location to advance to the *Inventory On Hand by Location Screen*.
Display buyer information	Select *Buyer Info* to return to the *Display Item/ Warehouse Information Screen*, where buyer information is displayed.
Display inventory warehouse information	Select *Whses/Item* to advance to the *Display Inventory Warehouses Screen*.
Display inventory location information	Select *Locs/Item* to advance to the *Display Inventory Locations Screen*.

Inventory On Hand by Location Screen

Purpose: Use this screen to review on hand inventory for items in a particular location.

How to display this screen: At the *Inventory On Hand by Location Selection Screen*, *select* a location. All fields are display-only.

Field	Description
Whse (Warehouse)	A code that represents the warehouse, validated against the Warehouse table. See *Creating and Maintaining Warehouses (WWHS)*. Numeric, 3 positions; display-only.
Location	A code that represents a warehouse location where merchandise is stored. The warehouse location code can consist of a zone/aisle/shelf/bin combination, or it can be any user-defined code. The location code prints on picks slips and reports. *Example:* The location A010201 indicates: `Zone Aisle Shelf Bin` `A 01 02 01` Alphanumeric, 7 positions; display-only.
Type	A code that defines the type of location. Valid values are: • *P* = Primary. The primary, or main location where the item is picked. The system does not delete a primary item/location record when the on-hand quantity equals zero. • *S* = Secondary. Typically, you would use a secondary location for storage when the primary location is full. The system allocates from a secondary location when the total order quantity cannot be filled from the primary location. The system allocates from both the primary and secondary locations when neither location contains enough stock to fulfill the entire order. You can use secondary locations to replenish primary locations. • *B*= Bulk. Typically, you would use a bulk location to store unbroken lots or cartons. Bulk locations serve as the replenishment source for primary locations. • *T* = Temporary. Typically, you would use a temporary location to place merchandise that you want recognized as received before you have assigned a permanent location. A temporary location cannot exist without at least one item/location record associated with it. When stock is moved into a temporary location, the system creates an item/location record. When the on-hand in the item/location reaches zero, the system will delete the location and the item/location record. **Note:** Order Administration will not allocate merchandise from a temporary location even if the location is defined as pickable. In order to allocate stock, you must move the merchandise to a non-temporary, pickable location. Alphanumeric, 1 position; display-only.
Item	A code that represents a unit of inventory. Alphanumeric, 12 positions; display-only.
SKU	The code that represents the special characteristics of the item (e.g., color, size, width). Alphanumeric, three 4-position fields; display-only.

Field	Description
On hand	The number of units of this item in this location in the warehouse. Numeric, 7 positions; display-only.
Printed	The number of pick slips printed for this item in the specific location. Numeric, 7 positions; display-only.

Screen Option	Procedure
Display buyer information	Select *Buyer Info* to return to the *Display Item/ Warehouse Information Screen*, where buyer information is displayed.
Display inventory warehouse information	Select *Whses/Item* to advance to the *Display Inventory Warehouses Screen*.
Display inventory location information	Select *Locs/Item* to advance to the *Display Inventory Locations Screen*.

Display Open Purchase Orders Screen

Purpose: Use this screen to obtain information about the unreceived or partially received purchase orders for an item. This screen includes the purchase order numbers, vendors, quantities and expected delivery dates for the item.

How to display this screen: Select *Open POs* at the *Display Item/Warehouse Information Screen*, the *Display Inventory Warehouses Screen*, or the *Display Inventory Locations Screen*

Field descriptions: The Item, SKU and Description fields are described at the *Display Item/Warehouse Information Screen*. The remaining fields on this screen are:

Field	Description
Whs (Warehouse)	The warehouse where the item will be delivered. Numeric, 3 positions; display-only.
PO#	The number of the purchase order on which you ordered the item from the vendor. Numeric, 7 positions; display-only.
Ln#	The line number of item on the purchase order. Numeric, 3 positions; display-only.
Vendor #	A code to identify the supplier of the item. Vendor codes are defined in and validated against the Vendor table; see *Working with Vendors (WVEN)*. Numeric, 7 positions; display-only.
Name	The name of the vendor associated with the vendor number. Blank if the *Vendor Name Display (D41)* system control value is *unselected*. Alphanumeric, 30 positions; display-only.
Qty due (Quantity due)	The number of units of the item expected in the shipment. Numeric, 7 positions; display-only.

Field	Description
Date	The date when the shipment of the item is expected; this is the date from the PO Layering table. If no entry exists in the PO Layering table or if the PO Layering record has a quantity of zero, then a next expected Po date does not display. Numeric, 6 positions (in user date format); display-only.

Display Item Warehouse History Screen

Purpose: Use this screen to review sale and return information for an item in the specified warehouse.

How to display this screen: Select *History* at the *Display Item/Warehouse Information Screen*.

Field	Description
Year (Accounting period year)	The year when the activity occurred. Numeric, 2 positions (YY format); optional.
Period (Accounting period number)	The accounting period within the specified year. Accounting periods are defined in and validated against the Accounting Period table; see *Working with Accounting Periods (WACP)*. Numeric, 2 positions; optional.
Item	A code that represents a unit of inventory. Alphanumeric, 12 positions; display-only.
Whse (Warehouse)	A code that represents the warehouse; defined in and validated against the Warehouse table. Numeric, 3 positions; display-only.
Today	Total Sales, Value sales, returns, and Value returns for the current date. These totals are updated during billing and are cleared by the Daily Clear Process periodic function (program name *MSR0574*).
Sales today	The number of sales for this item/SKU in this warehouse for today. Numeric, 20 positions; display-only.
Value sales today	The actual dollars sold (shipped and billed) for this item/SKU for today. This total is updated during billing with the actual merchandise dollars billed on the shipment. Numeric, 20 positions with a 2-place decimal; display-only.
Returns today	The number of units of this item/SKU in this warehouse returned for today. This total is updated when you receive a returned item through order entry, order maintenance, or return authorizations. Numeric, 11 positions; display-only.
Value returns today	The value of all returns that have been received today for this item/SKU in this warehouse. This total is updated when you receive the return through order entry, order maintenance, or return authorizations, using the actual price from when you shipped the item/SKU. Numeric, 20 positions with a 2-place decimal; display-only.

Display Item Screen

Purpose: Use this screen to review information for an item.

How to display this screen: Select *Display* for an item at the *Item/SKU Selection Screen*.

For more information: See *Create Item Screen* for field descriptions.

Display SKU (Base Information) Screen (Non-SKU'ed Item)

Purpose: Use this screen to display SKU-level detail information for a non-SKU'ed item.

Non-SKU'ed items: Although a non-SKU'ed item does not contain SKU elements such as color and size, every non-SKU'ed item has one SKU record. This SKU record contains the type of detail information that is kept at the SKU level for SKU'ed items, such as warehouse, location, and costing information.

How to display this screen: Select *SKU Details* for a non-SKU'd item at the *Item/SKU Selection Screen*.

For more information: See *Create Item (Base Information) Screen* for information on each field and option on this screen.

Display SKU - 1 of 2 (With Overrides) Screen

Purpose: Use this screen to review information about a specific SKU.

How to display this screen: Select *SKU Details* for a SKU'd item at the *Item/SKU Selection Screen*.

For more information: See *Create SKU 1 of 2 (With Overrides) Screen* for information on each field and option on this screen.

Display SKU - 2 of 2 (With Overrides) Screen

Purpose: Use this screen to review additional information about a specific SKU.

How to display this screen: Select *OK* at the *Display SKU - 1 of 2 (With Overrides) Screen*.

For more information: See *Create SKU 2 of 2 (With Overrides) Screen* for information on each field and option on this screen.

Printing Item Sales Analysis Reports (MISA)

Purpose: Use the Item Sales Analysis Reports to review inventory, cost, sales, and returns information for each item included on the report.

This menu option differs from many other report options in that you can define report selection criteria and sort options, and save your selections to run as needed.

In this topic:

- *Work with Report Selection Screen (MISA)*
- *Create Report Selection Screen*
- *Item Report Selection Screen (Defining Selection Criteria/MISA)*
- *Item Sales Analysis Save Options Screen (Additional Report Selections)*
- *Item Sales Analysis Report*
- *Display Sales Analysis Report Options Screen*

Work with Report Selection Screen (MISA)

How to display this screen: Enter *MISA* in the Fast path field at the top of any menu or select Print Item Sales Analysis Report from a menu.

Field	Description
User	The user ID of the person who created the report option. Alphanumeric, 10 positions; optional.
Report	The name of the report. Alphanumeric, 3 positions; optional.
Description	The description of the report. Alphanumeric, 40 positions; optional.
Date	The last date the report was printed or the report selection was updated. Numeric, 6 positions (in user date format); optional.
Time	The last time the report was printed or the report selection was updated. Numeric, 6 positions (HHMMSS format); optional.

Screen Option	Procedure
Create a report selection	Select *Create* to advance to the *Create Report Selection Screen*.
Define and save or print a report selection	*Select* a report selection to advance to the *Item Report Selection Screen (Defining Selection Criteria/ MISA)*.
Display a report selection	Select *Display* for a report to advance to the *Display Sales Analysis Report Options Screen*.

Create Report Selection Screen

Purpose: Use this screen to create the header information for a new version of the *Item Sales Analysis Report*.

How to display this screen: At the *Work with Report Selection Screen (MISA)*, Select *Create*.

Field	Description
Report	The name of the report selection. Alphanumeric, 10 positions; optional.
Description	The description of the report selection. Alphanumeric, 30 positions; optional.

Completing this screen: See *Item Report Selection Screen (Defining Selection Criteria/ MISA)* for information on how to continue creating a new report selection.

Item Report Selection Screen (Defining Selection Criteria/MISA)

Purpose: Use this screen to define how to select items for inclusion on the report. For example, to produce a report for items in Warehouse 1 that were supplied by vendors 100 and 200, you complete the warehouse and vendor fields at this screen.

How to display this screen: At the *Work with Report Selection Screen (MISA)*, *select* a report.

Field descriptions:

> **Note:**
>
> When selecting items to include on the report, the system checks the item's primary assignment in the Item or SKU table. You can check an item's assignment through the Enter/Maintain Items menu option; see *Performing Initial Item Entry (MITM)*. For example, if you specify warehouse 1 as a selection criterion, the system includes only items whose primary warehouse assignment is to this warehouse.

Field	Description
Whs (Warehouse)	A code that represents the warehouse. Validated against the Warehouse table. See *Creating and Maintaining Warehouses (WWHS)*. Numeric, 3 positions; optional.
Dept (Department)	A numeric code assigned to items to group them into departments for reporting purposes. Validated against the Department table; see *Working with Long SKU Departments (WLSD)*. Numeric, 4 positions; optional.
Class	A code assigned to a group of items to: • sort inventory • define information templates at the item class level • assign city/state restrictions • assign customer class restrictions See *Working with Item Classes (WICL)*. Alphanumeric, 3 positions; optional.
Vendor	A code that represents the supplier of an item. Validated against the Vendor table; see *Working with Vendors (WVEN)*. Numeric, 7 positions; optional.
Buyer	A code that represents a person who is authorized to make purchases for this item. Validated against the Buyer table; see *Working with Buyers (WBUY)*. Alphanumeric, 3 positions; optional.
Cat (Category)	A code assigned to an item to classify and group like items. Item categories are used in the Item Relationship function. Validated against the Item Category table; see *Working with Item Category Codes (WITG)*. Alphanumeric, 4 positions; optional.

Field	Description
Sts (Status)	A code that represents an item's status such as obsolete, discontinued, etc. This information is used for inventory reporting purposes only. See *Working with Item Status (WIST)*. Alphanumeric, 1 position; optional.

Completing this screen: When you complete this screen, you advance to the *Item Sales Analysis Save Options Screen (Additional Report Selections)*.

Item Sales Analysis Save Options Screen (Additional Report Selections)

Purpose: Use this screen to:

- select the sort order of the *Item Sales Analysis Report*
- select the accounting periods to include on the report
- indicate whether to print, save, or print and save the report
- optionally, enter a different description

How to display this screen: At the *Item Report Selection Screen (Defining Selection Criteria/MISA)*, select *OK*.

Field	Description
Sort selection	The sort selection field specifies how the report will be sorted. Valid values: • By Warehouse $ Sold Ascending • Warehouse $ Sold Descending • By Department $ Sold Descending • By Department $ Sold Ascending • By Item Class $ Sold Ascending • By Item class $ Sold Descending • By Vendor $ Sold Ascending • By Vendor $ Sold Descending • By Buyer $ Sold Descending • By Buyer $ Sold Ascending • By Category $ Sold Ascending • By Category $ Sold Descending • By Status $ Sold Descending • By Status $ Sold Ascending • By Item $ Sold Ascending • By Item $ Sold Descending • By $ Sold Ascending • By $ Sold Descending • By Units Sold Ascending • By Units Sold Descending Required.
Starting period	The starting month and year used in report selection. Enter the starting date to include. Numeric, 2 positions; required.

Field	Description
Ending period	The ending month and year used in the report selection. Enter the ending date to include. Numeric, 2 positions; required.
Selection option	Enter the number associated with the options, as follows: • *1* = Print the *Item Sales Analysis Report*; do not save the selection information • *2* = Save the selection information; do not print the report • *3* = Print the report and save the selection information Alphanumeric, 1 position; required.
Report code	The name of the report selection. Alphanumeric, 10 positions; display-only.
Description	The description of the report selection. Alphanumeric, 30 positions; required.

Completing this screen: Based on your selection option, the system prints the *Item Sales Analysis Report* and/or saves your selections.

Display Sales Analysis Report Options Screen

To display: Select *Display* for a report at the *Work with Report Selection Screen (MISA)* to advance to the Display Report Selection screen. This screen displays the selection criteria and sort selection for the report. You cannot change any information on this screen.

Printing Item Stock Status Reports (MISS)

Purpose: The Print Item Stock Status Report function is used to create, delete, and display status reports for item stock.

In this topic:

- *Work with Report Selection Screen (MISS)*
- *Create Report Selection Screen (MISS)*
- *Item Report Selection Screen (MISS)*
- *Item Stock Status Save Options Screen*
- *Item Stock Status Report*
- *Display Stock Status Report Options Screen*

Work with Report Selection Screen (MISS)

How to display this screen: Enter *MISS* in the Fast Path field at the top of any menu.

Field	Description
Report	The name of the report. Alphanumeric, 3 positions; optional.
Description	The description of the report. Alphanumeric, 40 positions; optional.

Field	Description
Date	The last date the report was printed or the report selection was updated. Numeric, 6 position (in user date format); optional.
Time	The last time the report was printed or the report selection was updated. Numeric, 6 positions (HHMMSS format); optional.

Screen Option	Procedure
Create a report selection	Select *Create* to advance to the *Create Report Selection Screen (MISS)*.
Define and save report selections	*Select* a report selection to advance to the *Item Report Selection Screen (MISS)*.
Display report selections	Select *Display* for a report selection to advance to the *Display Stock Status Report Options Screen*.

Create Report Selection Screen (MISS)

Purpose: Use this screen to define the name and description of the report selection.

How to display this screen: At the *Work with Report Selection Screen (MISS)*, Select *Create*.

Field	Description
Report	The name of the report selection which is used for future reference. The selection criteria are saved to the Item Report Selection table with this name the first time the report is run. In the future, you can call up these selection criteria by entering this report name. Alphanumeric, 10 positions; optional.
Description	The description of the report selection which is used for future reference. If the report selection is saved, the report description is displayed on the selection screen, provided you choose to list all of the previously saved report selections. Alphanumeric, 30 positions; optional.

Item Report Selection Screen (MISS)

Purpose: Use this screen to define the information that will be included on the report. For example, to produce a report for items in Warehouse 1 that were supplied by vendor's 100 and 200 you would define the warehouse and vendor fields at this screen.

How to display this screen: At the *Work with Report Selection Screen (MISS)*, *select* a report.

Field descriptions:

Field	Description
Whs (Warehouse)	A code that represents the warehouse, validated against the Warehouse table. See *Creating and Maintaining Warehouses (WWHS)*. Numeric, 3 positions; optional.
Dept (Department)	A numeric code used to group items into departments for reporting purposes. Validated against the Department table; see *Working with Long SKU Departments (WLSD)*. Numeric, 4 positions; optional.
Class	A user-defined code that identifies a group of items. Item Class codes are used as a high level method to: • sort inventory • define information templates at the item class level • assign city/state restrictions • assign customer class restrictions See *Working with Item Classes (WICL)*. Alphanumeric, 3 positions; optional.
Vendor	A user-defined code that represents the primary vendor or supplier of the item. Validated against the Vendor table. See *Working with Vendors (WVEN)*. Numeric, 7 positions; optional.
Buyer	A user-defined code that represents a person who is authorized to make purchases for this item. Validated against the Buyer table. See *Working with Buyers (WBUY)*. Alphanumeric, 3 positions; optional.
Cat (Category)	A user-defined code assigned to an item to classify and group like items. Item category is a level below the item class. Validated against the Item Category table. See *Working with Item Category Codes (WITG)*. Alphanumeric, 4 positions; optional.
Sts (Status)	A code that represents an item's status such as obsolete, discontinued, etc. This information is used for inventory reporting purposes only. See *Working with Item Status (WIST)*. Alphanumeric, 1 position; optional.

Item Stock Status Save Options Screen

Purpose: Once you have defined the report information, you are ready to save this information and to print the *Item Stock Status Report*.

How to display this screen: At the *Item Report Selection Screen (MISS)*, Select *OK*.

Field	Description
Sort selection	The sort selection field specifies how the report will be sorted. You can use the prompt (*click* on the arrow) to view the list of available values. Valid values: • By Item Warehouse • By Warehouse Item • By Depart. Item Warehouse • By Depart. Warehouse Item • By Item Class Item Warehouse • By Item Class Warehouse Item • By Vendor Warehouse Item • By Vendor Item Warehouse • By Buyer Item Warehouse • By Buyer Warehouse Item • By Category Warehouse Item • By Category Item Warehouse • By Status Item Warehouse • By Status Warehouse Item • By Backorder $ Ascending • By Backorder $ Descending • By Backorder Units Descending • By Backorder Units Ascending Required.
Include on order	*Selected* = The on-order (purchase order) quantity should be included in the quantity available calculation on the *Item Stock Status Report*. *Unselected* = The on-order quantity should not be included in the quantity available calculation on the Inventory Stock Status Report.
FIFO option	The FIFO option identifies whether the report should include held orders in the backorder calculation. Valid values: • *Both open and held orders* • *Open orders only* Required.
Selection option	Type the number associated with the option, as follows: 1. Print only = Prints the *Item Stock Status Report* and does not save your selections. You must select the sort option the next time you run this report. 2. Save only = Saves your selections, but does not print the report. 3. Save and print = Saves your selections and prints the report. Numeric, 1 position; required.
Report function	Represents the system-assigned function name of the report that is run. As each report is selected and run, the system will update this field with the name of the report. You cannot change this field. Alphanumeric, 1 position; display only.
Report code	The name of the report selection. The selection criteria is saved to the Item Report Selection table with this code. Alphanumeric, 10 positions; required.

Field	Description
Description	The description of the report selection. If the report selection is saved, the report description is displayed on this screen. Alphanumeric, 30 positions; required.

Completing this screen: Based on your selection option, the system prints the *Item Stock Status Report* and/or saves your selections.

Display Stock Status Report Options Screen

Display a report selection: Select *Display* for a report at the *Work with Report Selection Screen (MISS)* to advance to the Display Report Selection screen. You cannot change any information on this screen. See *Item Report Selection Screen (MISS)* for field descriptions.

Inventory Inquiry by Item (IIQI)

Purpose: Use the Inventory Inquiry by Item function to review item information organized by the base item and the first SKU element. The information presented through this function summarizes order and fulfillment activity; backorder and purchase order dates and totals; and returns and cancellations. You can also advance from the Inventory Inquiry by Item function to additional inventory inquiries.

The information presented through this function requires at least three screens to display (more if there are many SKU combinations). You advance left to right or right to left among these screens by pressing function keys.

Other options: You can use the following additional menu options for inventory inquiry:

- *Using Inventory Inquiry (DINI)*: to review inventory information for items within warehouses and locations in warehouses
- *Inventory Status Inquiry (ISIQ)*: to review order activity for any item or SKU broken out by offer

In this topic:

- *Inventory Inquiry by Item Prompt Screen (Selecting an Item)*
- *Inventory Inquiry by Item Screen (1 of 3)*
- *Inventory Inquiry by Item Screen (2 of 3)*
- *Inventory Inquiry by Item Screen (3 of 3)*
- *Enter New SKU Pop-Up Window*

Inventory Inquiry by Item Prompt Screen (Selecting an Item)

Purpose: Use this screen to select the item and first SKU element for inventory review.

How to display this screen: Enter *IIQI* in the Fast path field at the top of any menu or select Inventory Inquiry by Item from a menu.

Field	Description
Item	A code representing a unit of inventory that you sell to your customers. Item codes are defined in and validated against the Item table. Alphanumeric, 12 positions; required.
Colr (First SKU element)	A SKU defines an item's unique characteristics, such as its color, size, width, etc. You can define up to three SKUs for each item. You enter the value from the *Split SKU Element Column 1 Heading (A34)* system control value here. Alphanumeric, 4 positions; required if the item has SKUs.

Completing this screen: You advance to the *Inventory Inquiry by Item Screen (1 of 3)*.

Inventory Inquiry by Item Screen (1 of 3)

Purpose: Use this screen to review information about Item/SKU order activity and availability.

> **Note:**
>
> Each field is display-only.

How to display this screen: Enter a valid item code and first SKU element value at the *Inventory Inquiry by Item Prompt Screen (Selecting an Item)*.

Field	Description
Item	A code representing a unit of inventory you sell to your customers. Item codes are defined in and validated against the Item table. Alphanumeric, 12 positions.
Item description (unlabeled field to the right of the item code)	The description associated with the item. Alphanumeric, 120 positions.
Retail (Retail price)	The retail price for the item defined for the most current offer. If you define the price for items with SKUs at the SKU level rather than the item level, the retail price indicated is .00. Numeric, 13 positions with a 2-place decimal.
Dept (Long SKU department)	A code representing the department defined for the item. See *Working with Long SKU Departments (WLSD)*. Numeric, 4 positions.
COLR (First SKU element)	A SKU defines an item's unique characteristics, such as its color, size, width, etc. You can define up to three SKUs for each item. From the *Split SKU Element Column 1 Heading (A34)* system control value. Alphanumeric, 4 positions.
Description (Unlabeled field to the right of the first SKU element)	The description associated with the first SKU element. Alphanumeric, 10 positions.

Field	Description
Vendor	The vendor from the Item table, if any. See *Working with Vendors (WVEN)*. Alphanumeric, 7 positions.
Cost	The unit cost of the item. Each of these costs is stored in the SKU table. Numeric, 13 positions with a 4-place decimal.
Class	A code to identify a group of items. You might use item classes to assign city/state or customer class selling restrictions or sort inventory. Item class codes are defined in and validated against the Item Class table. See *Working with Item Classes (WICL)*. Alphanumeric, 3 positions.
Colr (First SKU element)	From *Split SKU Element Column 1 Heading (A34)* system control value. The figures on this row of information represent total inventory calculations for all SKUs for the item that match the SKU element 1 you selected. See field descriptions below, beginning with the *Cust ord (Customer orders)* field, for more information.
Item	The figures on this row of information represent item-wide total inventory calculations. See field descriptions below, beginning with the *Cust ord (Customer orders)* field, for more information.
Size (Second SKU element)	The second special characteristic of an item. From the Split SKU Element 2 Column Heading system control value. See *Split SKU Element Column Headings (A52, A53, A54)*. Alphanumeric, 4 positions.
Wdth (Third SKU element)	The third special characteristic of an item. From the Split SKU Element 3 Column Heading system control value. See *Split SKU Element Column Headings (A52, A53, A54)*. Alphanumeric, 4 positions.
	The following fields represent column headings for inventory information calculated for: • Clr: All SKUs containing the first SKU element you entered on the selection screen. • Item: All SKUs for the item, regardless of first SKU element. • Each unique SKU that contains the first SKU element you entered on the selection screen (these are the rows that display below the column headings)
TTL ord (Total ordered)	The total quantity of units ordered for this item or SKU across all offers. Includes both open and closed orders. Numeric, 7 positions.
Avail (Available)	The total quantity on-hand, minus the quantity on order. Negative figures represent backorders. For the SKU element 1 and Item totals, this figure represents the net of available minus backorders for all SKUs included in the calculation. Numeric, 7 positions.
Rsv (Reserved)	The total quantity reserved. Numeric, 7 positions.

Field	Description
Printed	The total quantity on printed pick slips. Numeric, 7 positions.
O/H (On hand)	The total quantity present in your warehouses. Numeric, 7 positions.
B/O (Backordered)	The total quantity that is backordered. Numeric, 7 positions.
Soldout control	Indicates whether there is a soldout control code for the item or SKU. You define soldout controls with one of three values: • sellout immediately • sellout when on-hand inventory is exhausted • sellout when on-hand inventory plus all purchase order receipts are exhausted. Valid values for this field are: *Selected* = There is a soldout control specified for this item or SKU. *Unselected* = There is no soldout control specified for this item or SKU. Soldout controls are defined in and validated against the Soldout Control table. See *Working with Soldout Controls (WSLD)*.

Screen Option	Procedure
Advance to Inventory Quantity Inquiry	Select *Inv Qty* to advance to the *Inventory Quantity Inquiry Prompt Screen*.
Advance to Inventory Status Inquiry	Select *Inv Status* to advance to *Inventory Status Inquiry (ISIQ)*.
Change the first SKU element	Select *Change Colr* to advance to the *Enter New SKU Pop-Up Window*.
Advance to the second screen	Select *Right* to advance to the *Inventory Inquiry by Item Screen (2 of 3)*.

Inventory Inquiry by Item Screen (2 of 3)

Purpose: Use this screen to review additional information about the item, including backorder and purchase order dates and order fulfillment figures.

How to display this screen: Select *Right* at the *Inventory Inquiry by Item Screen (1 of 3)*.

> **Note:**
>
> If you have advanced downward on the *Inventory Inquiry by Item Screen (1 of 3)* by pressing *Next* to review additional SKUs, you will retain this relative position when you advance to this screen or the *Inventory Inquiry by Item Screen (3 of 3)*.

Field descriptions: The information at the top of this screen, and the item/SKU information on the left, is repeated from the *Inventory Inquiry by Item Screen (1 of 3)*. The additional fields on this screen are described below.

The fields on this screen and the next are historical, representing life-to-date figures for all offers associated with the item or SKU.

Field	Description
Oldest B/O (Oldest backorder)	The date of the oldest backorder for the item or SKU. Numeric 6 positions (in user date format).
Recpt (Received)	The total received quantity for the item or SKU in all allocatable warehouses. Numeric, 7 positions.
On PO	The total quantity of the item or SKU on purchase order and not yet received. Numeric, 7 positions.
Next recpt (Next receipt)	The next date that you expect to receive the item or SKU at your warehouse. Numeric, 6 positions (in user date format).
Ship	The total quantity of the item or SKU that you have shipped to customers. Numeric, 7 positions.
Rtn (Returned)	The total quantity of the item or SKU that has been returned by customers. Numeric, 7 positions.
Cancel	The total quantity of the item or SKU that has been canceled. Numeric, 7 positions.

Screen Option	Procedure
Advance to Inventory Quantity Inquiry	Select *Inv Qty* to advance to the *Inventory Quantity Inquiry Prompt Screen*.
Advance to Inventory Status Inquiry	Select *Inv Status* to advance to *Inventory Status Inquiry (ISIQ)*.
Change the first SKU element	Select *Change Colrr* to advance to the *Enter New SKU Pop-Up Window*.
Return to the first screen	Select *Left* to return to the *Inventory Inquiry by Item Screen (1 of 3)*.
Advance to the third screen	Select *Right* to advance to the *Inventory Inquiry by Item Screen (3 of 3)*.

Inventory Inquiry by Item Screen (3 of 3)

Purpose: Use this screen to review exchange, net sales, lost sales and total order figures for the item or SKUs.

How to display this screen: Select *Right* at the *Inventory Inquiry by Item Screen (2 of 3)*.

> **Note:**
>
> If you have advanced downward on the *Inventory Inquiry by Item Screen (1 of 3)* or the *Inventory Inquiry by Item Screen (2 of 3)* by selecting *Next* to review additional SKUs, you will retain this relative position when you advance to this screen.

Field descriptions: The information at the top of this screen and the item/SKU information on the left, is repeated from the *Inventory Inquiry by Item Screen (1 of 3)*. The additional fields on this screen are described below.

The fields on this screen are historical, representing life-to-date figures for all offers associated with the item or SKU.

Field	Description
Exchg (Exchanges)	The total quantity of the item or SKU that has been exchanged. Numeric, 7 positions.
Net sales	Net sales for the item or SKU, calculated as: `Total quantity shipped - (returns + exchanges)` Numeric, 7 positions.
Lost sales	The total quantity of the item or SKU that customers would have ordered if the item or SKU were available. You enter lost sales through *Display Item Availability Screen* in Order Entry. Numeric, 5 positions.
Cust ord (Customer orders)	The total quantity ordered but not yet shipped. Numeric, 7 positions.

Screen Option	Procedure
Advance to Inventory Status Inquiry	Select *Inv Status* to advance to *Inventory Status Inquiry (ISIQ)*.
Change the first SKU element	Select *Change Colrr* to advance to the *Enter New SKU Pop-Up Window*.
Return to the first screen	Select *Left* to return to the *Inventory Inquiry by Item Screen (2 of 3)*.

Enter New SKU Pop-Up Window

Purpose: Select *Change Colrr* at the *Inventory Inquiry by Item Screen (1 of 3)*, *Inventory Inquiry by Item Screen (2 of 3)*, or *Inventory Inquiry by Item Screen (3 of 3)* to select another first SKU element to review. The Enter New SKU pop-up window opens:

You can enter a new SKU at this window, or prompt for all valid SKUs by *clicking* on the arrow in this field. You then advance to the Select SKU pop-up window; when you select a SKU from this window, the system defaults the first SKU element from your selection to the Enter New SKU pop-up window.

Retail Integration (External System to Order Administration)

Topic in this part: The following topics describe the processes, setup requirements, and functions available to upload item information from your retail system into Order Administration.

- *Retail Integration (External System into Order Administration) Overview and Setup* explains how you can keep merchandise information at your retail merchandising system in sync with merchandise information in Order Administration.
- *Working with Retail Integration Item Upload (RIIU)* explains how to upload item information from your retail merchandising system into Order Administration.
- *Creating and Maintaining Long SKU Divisions (WLDV)* explains how to create and modify long SKU division codes.

Working with Retail Integration Item Upload (RIIU)

Purpose: Use the Work with Retail Integration Item Upload menu option to process, review, and correct batch item upload records passed to Order Administration from a retail master system through the *RI Item Upload Table (RIIUPP)*.

About the generic RI Item Upload: This generic integration allows you to keep merchandise information at your merchandising system consistent with merchandise information in Order Administration. You can use the *RI Item Upload Table (RIIUPP)* to upload information about items and SKUs from the external system into Order Administration. The types of information you can upload include:

- items/SKUs
- item offers and SKU offers
- item prices and SKU prices
- vendor items
- item UPC's
- item coordinates

See the *Retail Integration (External System into Order Administration) Overview and Setup* for an overview and the required setup.

RMFCS integration: The item import from Oracle Retail Merchandising Foundation Cloud Service (RMFCS) also creates records in the RI Item Upload table; however, the RMFCS import uses a different set of files than that described in *Retail Integration (External System into Order Administration) Overview and Setup* to populate the RI Item Upload table, and a different periodic function. See *Oracle Retail Merchandising Foundation Cloud Service (RMFCS) and Oracle Retail Pricing Cloud Service (RPCS) Integration* for more information.

Require long SKU information? The *Use Retail Integration (H26)* system control value determines whether Order Administration changes certain table structures so that it can read records you upload from a retail system, including RMFCS. When this system control value is *selected*, the system:

1. uses long SKU class codes from the Retail Class table instead of long SKU class codes from the Long SKU Class table. This allows you to create a hierarchy of

retail class within long SKU department. You can link retail classes to a long SKU department in *Working with Long SKU Departments (WLSD)*.

2. requires a value in the Long SKU department, Long SKU class (retail class), Long SKU style, and Long SKU subclass fields when you create or maintain a base item.

If you wish to selectively require certain long SKU values, you can select one or more of the following system control values instead of selecting the *Use Retail Integration (H26)* system control value:

- *Require L/S Department (I92)*
- *Require L/S Class (I93)*
- *Require L/S Style (I94)* (This system control value also validates that the long SKU style code is unique at both the item and SKU level.)

Create supporting tables? Order Administration creates supporting table values, such as buyer code, for items/SKUs created or updated through the item upload if they do not already exist in the Order Administration table. See *Tables Updated by the RI Item Upload*.

Scheduling the generic item upload process: You can schedule the periodic functions, including the *UPRITEM Upload Retail Item File* (Program name *PFR0134*, Parameter *RIIUPP*), the *RI Item Upload Translation Program*, and *RI Item Upload Edit Program* to run the Item Upload Process periodically. See *Scheduling Jobs* for background. However, a different periodic function processes the item information from RMFCS; see *Oracle Retail Merchandising Foundation Cloud Service (RMFCS) and Oracle Retail Pricing Cloud Service (RPCS) Integration* for background.

Active procedure: The system creates the active procedure RI ITEM UPLOAD when you submit the process to prevent more than one RI Item Upload process from running at the same time.

In this topic:

- *RI Item Upload Process*
- *RI Item Upload Translation Program*
- *RI Item Upload Edit Program*
- *Tables Updated by the RI Item Upload*
- *RI Item Upload Table (RIIUPP)*
- *Work with Retail Item Upload Screen*
- *Change Item Upload Screens*
- *Change Item Upload - Item/SKU Screens*
- *Change Item Upload - Item Offer Screens*
- *Change Item Upload - SKU Offer Screens*
- *Change Item Upload - Item Price Screen*
- *Change Item Upload - SKU Price Screen*
- *Change Item Upload - Vendor Item Screen*
- *Change Item Upload - Item UPC Screen*
- *Change Item Upload - Item Coordinate Screen*
- *Display Item Upload Screens*

- *Work with Retail Item Upload Errors Screen*
- *Retail Item Upload Errors*
- *Item Upload Error Report*
- *Record Deleted from RI Item Upload Report*

RI Item Upload Process

You can create records in the *RI Item Upload Table (RIIUPP)* by using the *File Storage API*or *Work with File Uploads (WUPL)* to upload retail merchandise information into the *RI Item Upload Table (RIIUPP)*.

- If you use the *File Storage API* to upload the Retail Integration Item file named `RIIUPP` or `RIIUPP.TXT` into the FILE_STORAGE table and then use the *UPRITEM Upload Retail Item File* (Program name *PFR0134*, Parameter *RIIUPP*) periodic function to create records in the RI Item Upload Table (RIIUPP).
- If you use *Work with File Uploads (WUPL)*, the RI Item Upload Table records are created through the upload process.

You can use the sample data provided to create records in the text file you wish to upload; see *Sample Retail Integration Items Upload Data*.

> **Note:**
>
> When populating the RI Item Upload table:

- the information should be entered in all upper case values.
- If you wish to leave any field in the upload file blank, pass a space in an alphanumeric field and a 0 in a numeric so that the file can be processed without errors. Leaving a field with no space or 0 is interpreted as null in the database and causes errors.
- selecting *Accept* at the *Copy Item to Company Window* in *Working with Existing Items (MITM)*.

Once you have passed item upload records from your retail master system to the RI Item Upload table, you process the table by selecting *Process* at the *Work with Retail Item Upload Screen*. If you are copying items, the system submits the process automatically.

RMFCS integration: The item import from Oracle Retail Merchandising Foundation Cloud Service (RMFCS) also creates records in the RI Item Upload table; however, the RMFCS import uses a different set of files than that described in *Retail Integration (External System into Order Administration) Overview and Setup* to populate the RI Item Upload table, and a different periodic function. See *Oracle Retail Merchandising Foundation Cloud Service (RMFCS) and Oracle Retail Pricing Cloud Service (RPCS) Integration* for more information.

What type of information gets passed to the RI Item Upload table? The type of information in each RI Item Upload record is indicated by its record type:

- *01* = Item/SKU
- *03* = Item Offer

- *04* = SKU Offer
- *05* = Item Price
- *06* = SKU Price
- *07* = Vendor Item
- *08* = Item UPC
- *09* = Item Coordinate

Based on the record type, the system reads information related to that type and ignores any other information defined for the record. For example, when you are creating an item, the system does not check whether there is information in the record related to SKU price or item UPC.

Request types: These codes indicate whether the system creates or maintains the related information in Order Administration. Request types are:

- *A* = Add record; however, if the system finds a record in the Order Administration database that matches the information in the RI Item Upload record, the system changes the Request type to *C* and updates the existing record.
- *C* = Change record; however, if the system cannot find a record in the Order Administration database that matches the information in the RI Item Upload record, the system changes the Request type to *A* and creates a new record.
- *Blank* = The system compares the information in the RI Item Upload record to the existing records in the Order Administration database.
  - If the system cannot match the RI Item Upload record to an existing record in the Order Administration database, the system considers the RI Item Upload record an add request.
  - If the system can match the RI Item Upload record to an existing record in the Order Administration database, the system considers the RI Item Upload record a change request.

Key type: *IT* (item/SKU) indicates the system identifies the item and SKU associated with a record in the *RI Item Upload Table (RIIUPP)* using the *Item* and *SKU* passed in the record.

RI Item Upload Translation Program

The system calls the RI Item Upload translation program when you select *Process File* at the *Work with Retail Item Upload Screen*. The system also automatically calls this translation program when you select *Accept* at the *Copy Item to Company Window* in *Working with Existing Items (MITM)*.

The RMFCS integration also uses this program. See *Oracle Retail Merchandising Foundation Cloud Service (RMFCS) and Oracle Retail Pricing Cloud Service (RPCS) Integration* for more information.

Scheduling the RI Item Upload process: You can also schedule the *RI Item Upload Process* to run periodically by setting up the *RIUPLD* function using the PFR0084 program. See *Scheduling Jobs* for background.

The RI Item Upload translation program:

#	Step
1.	Creates the active procedure RI ITEM UPLOAD. See *Ending the RI Item Upload Process Before It Completes* if you need to end the RI Item Upload program before it is finished.
2.	Processes records in the *RI Item Upload Table (RIIUPP)* in record type sequence: 1. Process 01 Item/SKU records. 2. Process 03 Item Offer records. 3. Process 04 SKU Offer records. 4. Process 05 Item Price records. 5. Process 06 SKU Price records. 6. Process 07 Vendor Item records. 7. Process 08 Item UPC records. 8. Process 09 Item Coordinate records. If there are any records in *I* (In Process) status, changes their status to *U* (Unprocesssed). Order Administration only selects records to process that are in a *U* or blank (Unprocessed) or *E* (Error) status. When Order Administration selects a record type to process, the system updates the status of all records with this record type to *B* (Batch Selected) in order to prevent other activity against this set of records.
3.	For the record type selected to process, Order Administration processes records in batches of 1000 records, based on: • Earliest date and time. • If there are both add records and change records, process the add records first. When Order Administration processes a batch of 1000 records, the system updates the status of the records in the batch to *I* (In Process).
4.	For each record in the selected batch, identifies the *Item* and *SKU* defined for the item upload record.
5.	Checks for duplicate records in the selected batch of records.
6.	The system places any RI item upload record that fails one or more of the above edits in an error (*E*) status in the RI Item Upload table and in the RI Item Upload Error table. These records in error also print on the *Item Upload Error Report*. See *Work with Retail Item Upload Errors Screen*.

RI Item Upload Edit Program

Once the *RI Item Upload Translation Program* identifies the item/SKU associated with the item upload record the system calls the RI Item Upload Edit Program. This edit program checks for invalid field values or combinations in the RI item upload record. If the record passes all validations, the edit program:

#	Step
1.	Checks the ***DFLT ITEM Item/SKU* to determine whether to default values to any blank fields in the RI item upload record. The system checks the **DFLT ITEM only for add and change item upload records for record type *01* (item/SKU information). See ***DFLT ITEM Item/SKU*.

#	Step
2.	Checks the ***DFTCHG Item/SKU* to determine whether to update an existing item/SKU with the values in the RI item upload record. The system checks the **DFT CHG item only for change item upload records for record type *01* (item/SKU information). See ***DFTCHG Item/SKU*. **Note:** If the **DFT CHG item has a value, the system does not validate that field in the RI item upload record.
3.	Creates or maintains the item/SKU, based on the *Request Type* for the item upload record. If the *Auto-Generate Item Keywords from Description (F79)* system control value is selected, the system also creates keywords for items created through the RI Item Upload process for record type *01* Item/SKU.
4.	Changes the status of the item upload records to *P* (Processed).
5.	If the *Create Generic Item Download Trigger Records (I15)* system control value is selected, the system submits the secondary job *RISECU* to create item download triggers and changes the status of the item upload records to *S* (Other Updates).
6.	Deletes the RI item upload record from the *RI Item Upload Table (RIIUPP)*.
7.	If the RI item upload record fails any validation, the edit program: • Changes the status of the RI item upload record to *E* (Error) and does not delete the record from the RI Item Upload table. • Creates a record in the RI Item Upload Error table which displays the reason(s) why the record failed.
8.	Once RI item upload records are processed, the records are listed on: • *Item Upload Error Report*: indicates that RI item upload records failed one or more edits and remain in the RI Item Upload table. • *Record Deleted from RI Item Upload Report*: indicates that you deleted the RI item upload record(s) from the RI Item Upload table by selecting *Delete* for an item upload record at the *Work with Retail Item Upload Screen*. This means that the edit program did not create or maintain any item/SKU information.

Retail Item Upload Email

If a valid email is defined in the Email address field for the user that submitted the RI Item Upload Program, the system sends a Retail Item Upload email to the user's email address when the job completes indicating whether all records were processed successfully or whether any records contain errors.

Sample successful email: A sample of the retail item upload email that is generated when all of the records processed successfully is displayed below.

Address information:

```
From: [email from]
```

`To: [email to]`

`Subject: Retail Item Upload finished successfully`

System generated text: `The Retail Item Upload has run successfully with no errors.`

Sample error email: A sample of the retail item upload email that is generated when one or more records contain errors is displayed below.

Address information:

`From: [email from]`

`To: [email to]`

`Subject: Retail Item Upload finished with errors`

System generated text: `The Retail Item Upload has run successfully but errors exist. Please review reports produced for more information.`

You can use the *Item Upload Error Report* to review the item upload records that failed one or more edits and remain in the RI Item Upload table.

Ending the RI Item Upload Process Before It Completes

If you need to end the RI Item Upload program before it is finished (if, for example, you are processing a large number of RI item upload records), you can terminate the job by deleting the RI ITEM UPLOAD active procedure in the *Purging Active Procedures (MACP)* menu option.

When you delete the RI ITEM UPLOAD active procedure, the system:

1. Finishes processing the current batch of 1000 RI Item Upload records.
2. Terminates the RI Item Upload job.
3. If the *Create Generic Item Download Trigger Records (I15)* system control value is selected, the system submits the secondary job *RISECU* for the RI Item Upload records that finished processing. The system changes the status of these item upload records to *S* (Other Updates). Once the *RISECU* job ends, the system deletes these RI item upload records from the *RI Item Upload Table (RIIUPP)*.
   Note: You can submit another RI Item Upload process while the *RISECU* job is running.
4. Updates the status of any remaining records in a *B* (Batch Selected) status to *U* (Unprocessed).
5. Leaves any remaining unprocessed records until the next time you run the RI Item Upload program.

Tables Updated by the RI Item Upload

For every RI item upload record that you pass to the *RI Item Upload Table (RIIUPP)*, you can create, change or delete primary item and SKU values in these tables:

- Item
- SKU
- Vendor Item

- Item/Offer
- SKU/Offer
- Item Price
- SKU Price
- Item UPC
- Item Coordinate

Using the RI item upload, you can create values for secondary, supporting item/SKU tables. You can only create secondary table values; the system does not allow you to change already existing values. You can create values in these secondary item/SKU-related tables:

- SKU Element 1
- SKU Element 2
- SKU Element 3
- Item Warehouse
- Item Location
- Item Class
- Item Status
- Buyer
- L/S Department
- L/S Class
- L/S Division
- Retail Class
- Item Category

RI item upload processing will not create records in the more complex or Order Administration-specific secondary tables. You must manually create these values before passing them in a retail item upload request. For example, you cannot create ship vias, warehouses, locations, drop points, seasons, entities, vendors, sold out controls, and any other table not specifically mentioned above using the item upload.

RI Item Upload Table (RIIUPP)

The values you enter in the key type fields determine the fields in the RI item upload record for which you must enter a value. See:

- *Keys to the table: fields that are required for all record types*
- *Fields for 01 Item/SKU record type*
- *Fields for 03 Item Offer record type*
- *Fields for 04 SKU Offer record type*
- *Fields for 05 Item Price record type*
- *Fields for 06 SKU Price record type*
- *Fields for 07 Vendor Item record type*
- *Fields for 08 Item UPC record type*
- *Fields for 09 Item Coordinate record type*

****DFLT ITEM and **DFTCHG:** You can create the following items for the system to consider when uploading RI item upload records for record type *01* (item/SKU information).

- ***DFLT ITEM:* create this item to define the values to *default* to add or change item upload records; see ***DFLT ITEM Item/SKU*.
- ***DFTCHG:* create this item to determine *when* the system updates an existing item/SKU with the values defined in a change item upload record; see ***DFTCHG Item/SKU*.

> **Note:**
>
> You are not required to create the ***DFLT ITEM* item or ***DFTCHG* item, however it is recommended.

This table indicates the name of the field in the RI Item Upload table and a description of the field.

Populating the RI Item Upload table: Create an RI Item Upload text file that contains the records you wish to upload. Run the *UPRITEM Upload Retail Item File* (Program name *PFR0134*, Parameter *RIIUPP*) periodic function or use the *Work with File Uploads (WUPL)* menu option to upload the records in the text file to the RI Item Upload table. You can use the sample data provided to create records in the text file you wish to upload; see *Sample Retail Integration Items Upload Data*.

When populating the RI Item Upload table, the information should be entered in all upper case.

RMFCS integration: See *RMFCS to OACS Mapping* for information on how the data from RMFCS maps to Order Administration.

Field	Description
	Keys to the table: fields that are required for all record types You must enter a value in these key fields. The values you enter for these keys determine: • What information gets passed to Order Administration. • Whether the RI item upload program creates or changes an item. • How the RI item upload program identifies the Order Administration item associated with the item upload record. See *Basic errors* and *Item errors*.
Company	A code that represents the company to which you wish to upload retail item/SKU information. Company codes are defined in and validated against the Company table. Numeric, 3 positions; required.

Field	Description
Record Created Date	The date you create the RI item upload record. **Note:** If you leave this field blank and select *Change* for the RI item upload record at the *Work with Retail Item Upload Screen*, you advance to an E2 Key Screen and will not be able to correct any errors in the record. Numeric, 7 positions (CYYMMDD format); required.
Record Created Time	The time you create the item upload record. **Note:** If you leave this field blank and select *Change* for the RI item upload record at the *Work with Retail Item Upload Screen*, you advance to an E2 Key Screen and will not be able to correct any errors in the record. Numeric, 6 positions (HHMMSS format), required.

Field	Description
Record Type	A code that defines the item/SKU information you want to add or change. Valid values are: • *01* = Item/SKU • *03* = Item Offer • *04* = SKU Offer • *05* = Item Price • *06* = SKU Price • *07* = Vendor Item • *08* = Item UPC • *09* = Item Coordinate **Note:** You must enter the leading *0* in this field. For example, you must pass *01* and not just *1*. The record type determines which fields the system considers in the RI item upload record. For example, if you want to change a SKU's price information, enter an *06* record type. Even if all the fields in the RI item upload record are populated for that SKU, the system only looks at information in the nine SKU price fields. See the following for the fields and descriptions associated with each record type: • *Fields for 01 Item/SKU record type* • *Fields for 03 Item Offer record type* • *Fields for 04 SKU Offer record type* • *Fields for 05 Item Price record type* • *Fields for 06 SKU Price record type* • *Fields for 07 Vendor Item record type* • *Fields for 08 Item UPC record type* • *Fields for 09 Item Coordinate record type* **Note:** When passing information to Order Administration, you must build upon values passed in this record type. For example, you cannot create a vendor item (*07* record type) until you have first created the item/SKU (*01* record type).

Field	Description
	****DFLT ITEM and **DFTCHG** The ***DFLT ITEM Item/SKU* allows you to default values to blank fields in an add or change RI item upload record for an item/SKU record type. The ***DFTCHG Item/SKU* determines if the system updates an existing item with the values defined in a change RI item upload record for an item/SKU record type. See *Creating Default and Change Item/SKU Upload Values: **DFLT ITEM and **DFTCHG*. Alphanumeric, 2 positions; required.
Request Type	A code that defines whether the upload program creates or maintains item/SKU information. Valid values are: • *A* = Add record; however, if the system finds a record in the Order Administration database that matches the information in the RI Item Upload record, the system changes the Request type to *C* and updates the existing record. • *C* = Change record; however, if the system cannot find a record in the Order Administration database that matches the information in the RI Item Upload record, the system changes the Request type to *A* and creates a new record. • *Blank* = The system compares the information in the RI Item Upload record to the existing records in the Order Administration database. • If the system cannot match the RI Item Upload record to an existing record in the Order Administration database, the system considers the RI Item Upload record an add request. • If the system can match the RI Item Upload record to an existing record in the Order Administration database, the system considers the RI Item Upload record a change request. **Add Request Type (A)** You can pass numerous add requests for the same item/SKU with these record types: • *03* (item offer) • *04* (SKU offer) • *05* (item price) • *06* (SKU price) • *07* (vendor item) • *08* (UPC record type) • *09* (item coordinate) You can pass multiple add requests for an existing item (record type *01*) as long as you are creating a new SKU; see *Record Type*. If you pass blank values for an item/SKU (*01* record type), the system defaults values based on the **DFLT ITEM and system control values; see ***DFLT ITEM Item/SKU*.

Field	Description
	Change Request Type (C) You can pass multiple change requests for all record types; however, the fields associated with the specified record type are overwritten with the most recent information you pass for that record type. If you pass blank values for an item/SKU (*01* record type), the system defaults values using the **DFLT ITEM and system control values. Also, if a value exists in **DFTCHG, the system does not update the existing item with the upload value; see *Creating Default and Change Item/SKU Upload Values: **DFLT ITEM and **DFTCHG*. If you pass blank values for any other record type, the system updates the value for the existing item to blank. **Note:** The system does not update any history records for transactions that occurred prior to the change date. Alphanumeric, 1 position; optional.
Sequence #	A unique sequence number assigned to the RI item upload record. Sequence numbers can be in a random order or sequentially assigned, but they must be unique for each day. Numeric, 3 positions; required.
Key Type	A code that defines how the system identifies the Order Administration item/SKU associated with a change item upload record. *IT* (Item/SKU) is the only valid key type and indicates the upload record contains the item code, and optionally SKU code, that matches a Order Administration item/SKU. If the item contains SKUs and you do not enter a SKU code, the system maintains the base item. **Note:** If you pass an invalid key type for an *01* Item/SKU record type, the system automatically corrects it. Alphanumeric, 2 positions; required.
Order Administration values	

Field	Description
Item	A user-defined code that represents a unit of inventory. For an add request for an *01* *Record Type*, you must pass an item code unless you have the *Auto Assign Item # (D46)* system control value *selected*. **Note:** The item code you enter must identically match an item in Order Administration for the system to identify the item associated with a change item upload record. Alphanumeric, 12 positions; required.
SKU	The unique attributes of an item, such as color, size, and style. Does not include distinct fields for split SKU elements; therefore, you must count positions and enter the SKU element in the respective place on the field. Spacing is as follows: 1. SKU Element 1 = spaces 1-4 2. SKU Element 2 = spaces 6-9 3. SKU Element 3 = spaces 11-14 Alphanumeric, 14 positions; required if the *Allow SKUs* field is selected.
Status	A system-generated code that represents the record's status in the RI Item Upload table. Valid values are: • *U* or blank = Unprocessed • *B* = Batch Selected • *I* = In Process • *S* = Other Updates • *P* = Processed • *E* = Error • *D* = Delete Pending When you initially upload records to the RI Item Upload table, the unprocessed records display on the *Work with Retail Item Upload Screen* with a blank *Sts (Status)* field. When you select *Process File* to process and edit the item upload records, the system updates all records with the appropriate status. Only records in *E* status remain visible at the Work with Retail Item Upload Screen so that you can correct them. Alphanumeric, 1 position; optional.
Processed Date	The date the item upload record was processed. This date is used to update the Created date and the Last change date in the Item table. This date is visible as the *Last chg date (Last change date)* field in Creating and Maintaining Items (MITM). Numeric, 7 positions (CYYMMDD format); optional.
Processed Time	The time the item upload record was processed. This time is used to update the Created time and Maintained time in the Item table. Numeric, 6 positions (HHMMSS format); optional.

Field	Description
Fields for 01 Item/SKU record type	See *Basic errors*, *Item errors*, and *SKU errors*. **Note:** This table currently does not contain the *External info* field; however, you can update this field on the Change Item screen.
Allow SKUs	Indicates whether the item is available in various styles, such as color, size, etc. Valid values are: • *Y* = This item has SKUs associated with it. • *N* = There are no SKUs associated with this item. Enter *Y* in this field when you pass an *01* (Item/SKU), *04* (SKU Offer), *06* (SKU Price) or *07* (Vendor Item) *Record Type* for upload records containing a SKU code. Does not default from the ***DFLT ITEM Item/SKU*. If you leave this field blank, the system looks at the SKU field; if the SKU field contains a value, the system updates this flag to *Y*; if the SKU field does not contain a value, the system updates this flag to *N*. Alphanumeric, 1 position; optional.
Cub val	The cubic volume of the item. Controls the number of units of the item that can fit into a carton. Numeric, 7 positions with a 1-place decimal; optional.
Drop Ship	Indicates whether you ship the item from your warehouse, or have your vendor ship it to the customer directly. Valid values are: • *Y* = When a customer orders the item, you order the item from your vendor and the vendor ships it directly to your customer. • *N* = You ship the item from your warehouse. If you leave this field blank, it defaults from the ***DFLT ITEM Item/SKU*. If the ***DFLT ITEM Item/SKU* does not exist, the system defaults this field to *N*. Alphanumeric, 1 position; optional.
Height	The height measurement for an item. The Height, Length, and Width values determine the cubic volume of an item. Can be entered in feet or centimeters, or any other measurement as long as it is consistent. Numeric, 3 positions; optional.

Field	Description
Kit Type	Defines the type of kit or set functionality represented by this item. Valid values: • *S* = Set • *V* = Variable set • *Blank* = none of the above **Note:** You cannot link set component items to the main set item through the item upload; you must do this within Order Administration after you create the item/SKU records. Alphanumeric, 1 position; optional.
Length	The length measurement for an item. The Height, Length, and Width values determine the cubic volume of an item. Can be entered in feet or centimeters, or any other measurement as long as it is consistent. Numeric, 3 positions; optional.
Long SKU Style	A user-defined field representing the long SKU style defined for the item. If the *Require L/S Style (I94)* system control value is *selected*, the system requires a long SKU style when creating or updating a SKU and validates that the long SKU style code defined at the item level and SKU level are both unique values. **Note:** If the *Use Retail Integration (H26)* system control value is *selected*, the system ignores the setting of the *Require L/S Style (I94)* system control value. In this situation, the system requires a long SKU style when creating or updating an item, but it does not have to be unique. Alphanumeric, 20 positions; required if SCV H26 or SCV I94 is selected.
Retail Style #	A user-defined code used to identify the item. Alphanumeric, 20 positions; optional.
Long SKU Vendor	A user-defined field representing the long SKU vendor for the item/SKU. Alphanumeric, 7 positions; optional.
Standard Cost	The standard cost of the item. This is the cost that appears in the Default cost field in the Item table. Numeric, 13 positions with a 4-place decimal; optional.

Field	Description
Non-Inventory	Indicates whether inventory levels are maintained for the item. 1. *Y* = This is a non-inventory item. 2. *N* = This is a regular item that will be tracked. If you leave this field blank, it defaults from the ***DFLT ITEM Item/SKU*. If the ***DFLT ITEM Item/SKU* does not exist, the system defaults this field to *N*. Alphanumeric, 1 position; optional.
Pieces Per Case	The system uses this value to determine the number of units that fit in a case when suggesting location placement. Numeric, 5 positions; optional.
Selling Qty	The selling quantity defines the required order quantity (or multiple of) for this item. For example, an item may be stocked in single units, but must be sold in quantities of 6 (or 12, or 18, etc.). Numeric, 5 positions; optional.
Selling Weight	Used to calculate the freight charge on an item when the *Freight method* on the order is *By Item* or *Flat Rt/Item*. Numeric, 7 positions with a 3-place decimal; optional.
Serial # Tracking	This field is not implemented; enter *N* in this field. Alphanumeric, 1 position; optional.
Ship Alone	Indicates how to ship this item. Valid value is: *S* = This item must ship by itself, and each unit prints on its own pick slip. Blank = This item can ship with other items. Alphanumeric, 1 position; optional.
Ship Weight	The actual shipping weight of the item. Numeric, 7 positions with a 3-place decimal; optional.
User Field 1	An informational field you can use according to your organization's specific requirements. Alphanumeric, 10 positions; optional.
User Field 2	An informational field you can use according to your organization’s specific requirements. Alphanumeric, 10 positions; optional.
User Field 3	An informational field you can use according to your organization’s specific requirements. Alphanumeric, 10 positions; optional.
User Field 4	An informational field you can use according to your organization’s specific requirements. Alphanumeric, 10 positions; optional.
Width	The width measurement for an item. The Height, Length, and Width values determine the cubic volume of an item. Can be entered in feet or centimeters, or any other measurement as long as it is consistent. Numeric, 3 positions; optional.

Field	Description
Allow % discount?	Determines whether certain discounts can be applied to the item. • *Y* = This item is discountable. • *N* = This item is not discountable. If you leave this field blank, it defaults from the ***DFLT ITEM Item/SKU*. If the ***DFLT ITEM Item/SKU* does not exist, the system defaults this field to *N*. Alphanumeric, 1 position; optional.
Oversize	Determines whether this item is considered an oversized item. • *Y* = This is an oversized item. • *N* = This is not an oversized item. If you leave this field blank, it defaults from the ***DFLT ITEM Item/SKU*. If the ***DFLT ITEM Item/SKU* does not exist, the system defaults this field to *N*. Alphanumeric, 1 position; optional.
Description (Item description)	The description of the item. Does not default from the ***DFLT ITEM Item/SKU*. **Note:** Although you can create an item with a description of up to 120 positions, you cannot save a record at the *Change Item Upload - Item/SKU Screens* if the description exceeds 40 positions. Alphanumeric, 120 positions; required.
Second Language Desc	The second language description for the item. Alphanumeric, 40 positions; optional.
Exclude From Flex Pay	Determines whether this item is excluded from deferred and installment payment plans. Valid values are: • *Y* = Exclude this item from deferred and installment payment plans. • *N* = Do not exclude this item from deferred and installment payment plans. If you leave this field blank, it defaults from the ***DFLT ITEM Item/SKU*. If the ***DFLT ITEM Item/SKU* does not exist, the system defaults this field to *N*. Alphanumeric, 1 position; optional.

Field	Description
Royalty	Indicates whether sales of the item require royalty payments to an author or owner, and is used for query and reporting purposes only. Valid values are: 1. *Y* = This is a royalty item. 2. *N* = This is not a royalty item. If you leave this field blank, it defaults from the ***DFLT ITEM Item/SKU*. If the ***DFLT ITEM Item/SKU* does not exist, the system defaults this field to *N*. Alphanumeric, 1 position; optional.
Membership	Indicates that the item represents a membership program, which you can use to generate periodic orders to a customer. Valid values are: • *Y* = This is a membership item. • *N* = This is not a membership item. If you leave this field blank, it defaults from the ***DFLT ITEM Item/SKU*. If the ***DFLT ITEM Item/SKU* does not exist, the system defaults this field to *N*. Alphanumeric, 1 position; optional.
Qty Threshold	You can use this field to indicate when to trigger an automatic download of item availability information to an extract table; from there, the information is available to a web storefront if you use the *E-Commerce Interface*. This download allows you to display an item's availability status to web customers if your web storefront supports it. **Note:** Although this field has a 9.0 length in the RI Item Upload table, you can only pass a 5-position value. If you pass more than 5 numbers, the edit program displays an error message: `Quantity must be limited to 99999`. Numeric, 9 positions; optional.
SVC type	A code that indicates the item is a stored value card, and whether the stored value card is a physical or virtual card. • *blank* (default) = The item is not a stored value card. • *P* = The item is a physical stored value card. • *E* = The item is a physical stored value card and, as soon as the stored value card is processed through billing, the system sends an email notification to the recipient card holder on the order, notifying the customer that a stored value card has been purchased and is in the process of being delivered. • *V* = The item is a virtual (non-physical) stored value card. See *Creating a Stored Value Card Item* for more information on setting up a stored value card item. Alphanumeric, 1 position; optional.

Field	Description
Buyer	The person who is authorized to make purchases for your company. Buyer codes are defined in and validated against the Buyer table; see *Working with Buyers (WBUY)*. Alphanumeric, 3 positions; optional.
CTN ID # (SKU) (Carton ID)	The type of carton in which this item must be shipped. **Note:** This field is not currently implemented. Numeric, 2 positions; optional.
Inventory Value G/L #	This field is not implemented. Numeric, 8 positions; optional.
Code (Hazard code)	A user-defined code used to categorize an item as a hazardous material that requires special storage and/or handling. Validated against the Item Hazard table; see *Working with Hazardous Item Codes (WHAZ)*. Numeric, 2 positions; optional.
Item Class	A user-defined code that identifies a group of items. This code is validated against the Item Class table; see *Working with Item Classes (WICL)*. An item class code is required if the *Require Item Class in Work with Items (F06)* system control value is *selected*. Alphanumeric, 3 positions; required if SCV F06 is selected.
SKU Group	A code that represents a group of common characteristics of a SKU item. SKU Group codes are defined in and validated against the SKU Group table; see *Working with SKU Groups (WISG)*. Numeric, 3 positions; optional.
STS (Status)	A code that represents an item's status, such as obsolete, discontinued, etc. This information is used for inventory reporting purposes, to assign a future arrival date, or to prevent the Item Selection screen from listing the item. See *Working with Item Status (WIST)* for background. Alphanumeric, 1 position; optional.
Location Class	A code that represents a location type, such as caged area, etc. Validated against the location class table; see *Creating and Maintaining Location Classes (WLCL)*. Alphanumeric, 2 positions; optional.

Field	Description
Class (Long SKU class)	A code to group items into classes for reporting purposes. Required if the *Use Retail Integration (H26)* or *Require L/S Class (I93)* system control value is selected. **Long SKU Class** If the *Use Retail Integration (H26)* system control value is *unselected*, the system validates this field against the Long SKU Class table. Long SKU classes have only one value to an organization. For example, Long SKU Class 15 may be Men's Shoes, and will remain Men's Shoes regardless of the department. For more information see *Working with Long SKU Classes (WLSC)*. **Retail Class** If the *Use Retail Integration (H26)* system control value is *selected*, the system validates this field against the Retail Class table instead of the Long SKU Class table. Long SKU classes that are linked to long SKU departments are called retail classes. Retail classes are department specific. For example, Retail Class 10 may be Ties within Department 20 (Men's Apparel), but within Department 30 (Women's Apparel) Retail Class 10 may be Slacks. See the *Work with Retail Class Screen*. If you pass a new retail class code to Order Administration, the system reads the long SKU department code (whether new or existing) with the new retail class code and creates the retail class and description. If you do not pass a long SKU department code and a long SKU department code does not default from the ***DFLT ITEM Item/SKU*, the system displays an error message: `Long SKU Department required`. If you enter an invalid combination of codes or do not enter a long SKU department code, the system displays an error message: `Invalid Long SKU Class/Department combination for item`. If you leave this field blank and a retail class code does not default from the ***DFLT ITEM Item/SKU*, the system displays an error message: `Item Long SKU Class required`. Numeric, 4 positions; required if SCV H26 or SCV I93 is selected and you are using an 01 record type.
Department (L/S department)	A code used to group items into departments for reporting purposes. Required if the *Use Retail Integration (H26)* or *Require L/S Department (I92)* system control value is selected. Long SKU departments are defined in and validated against the Long SKU Department table; see *Working with Long SKU Departments (WLSD)*. When using Retail Integration from an external system into Order Administration, long SKU classes are linked to long SKU departments and become retail classes. You can pass a new or existing long SKU department code with a new or existing retail class code and the system creates the long SKU department and the associated retail class. If you do not pass a long SKU department code and one does not default, the system displays an error message: `Long SKU Department required`.

Field	Description
	If you enter an invalid combination of codes or do not enter a long SKU department code, the system displays an error message: `Invalid Long SKU Class/Department combination for item`. If the *Require Long SKU Division with Long SKU Department (E85)* system control value is *selected*, you must enter a value in the *L/S Division* field or use a L/S department code that already has a L/S division code assigned to it. If the system creates the long SKU department, the system will also create the long SKU division if it does not already exist. However, if the long SKU department does not need to be created, the system will not create the long SKU division if it does not already exist. Numeric, 4 positions; required if SCV H26 or SCV I92 is selected and you are using an 01 record type.
L/S Division	A code that represents a long SKU division. L/S divisions are used in conjunction with L/S departments and L/S classes for reporting purposes and to create a company or entity hierarchy. Long SKU division codes are defined in and validated against the L/S Division table. If the *Require Long SKU Division with Long SKU Department (E85)* system control value is *selected*, you must specify a long SKU division when the long SKU department is either new, or does not have a L/S division associated with it. If the long L/S department already exists and is already assigned a L/S division, you do not need to enter a L/S division code. If the L/S division is new, the system creates a new code in the L/S Division table, but only if the system is also creating the long SKU department. **Note:** Although the long SKU division field is 4 positions elsewhere, the RI Item Upload table supports just 3 positions. Alphanumeric, 3 positions; required if the Require L/S Division with L/S Department (E85) system control value is selected and you are passing a new L/S department value.
UOM (Unit of Measure)	A standard by which an item is sold. Typical units of measure include: • *EA* = each • *IN* = inches • *C12* = case of 12 Validated against the Unit of Measure table (see *Working with Units of Measure (WUOM)*). If you leave this field blank, defaults from the *Default Item Unit of Measure (B33)* system control value. Alphanumeric, 3 positions; optional.

Field	Description
Vendor #	A code that defines the vendor or supplier of an item. Vendor codes are defined in and validated against the Vendor table; see *Working with Vendors (WVEN)*. Numeric, 7 positions; optional.
Ship Via Code	A code that represents the carrier that must be used when shipping this item. Numeric, 2 positions; optional.
Manufacturer Vendor	The vendor who manufactured the item. Numeric, 7 positions; optional.
Entity Number	A business unit within your company that is held accountable for sales performance; for example, mail order, retail, or e-commerce. If the system control value *Require Entity in Item File (G44)* is *selected*, you must enter an entity code for each item you set up; entity codes for items and SKUs are defined at the item level. Informational only. Numeric, 3 positions; optional.
Season	Defines the season associated with this item, such as spring. Season codes are defined in and validated against the Season table; see *Working with Season Codes (WSEA)*. Alphanumeric, 3 positions; optional.
Collating Seq #	The sequence number used to determine the order in which SKUs sort. You can use the sort sequence to display SKUs in a different order, such as by size, rather than alphanumerically by SKU code. Required if the *Require Sort Sequence Number in the SKU File (F23)* system control value is *selected*. See *SKU Sort Sequence Numbers* for an overview. Numeric, 5 positions; required if the Require Sort Sequence Number system control value is selected.
Compatibility	A user-defined code assigned to an item/SKU. Alphanumeric, 3 positions; optional.
SKU Last purchase cost	The cost of the item from the most recent purchase order, including any discounts, surcharges, or additional charges. Numeric, 13 positions with a 4-place decimal; optional.
Cub val (Cubing value)	The cubic volume of the SKU, which overrides the cubic volume defined at the base item level. Numeric, 7 positions with a 1-place decimal; optional.
SKU Description	The description of the SKU element. If no value is passed, the SKU description will be blank. Alphanumeric, 40 positions; optional.

Field	Description
Subscription	Indicates whether the item is a subscription item. Valid values are: 1. *Y* = Item is a subscription item. 2. *N* = Item is not a subscription item. If you leave this field blank, it defaults from the ***DFLT ITEM Item/SKU* If the ***DFLT ITEM Item/SKU* does not exist, the system defaults this field to *N*. If you identify an item as a subscription item, you must: 1. enter *Y* in the *Non-Inventory* field to indicate that inventory levels are not maintained for the subscription item and that customer will be billed (the full price of the subscription) immediately through Express Billing. 2. create a record for the subscription in the Item Subscriptions table to define the particulars of the subscription, such as the current issue number, length of subscription (number of intervals and number of days between issues). See *Working with Item Subscriptions (WISB)*. Alphanumeric, 1 position; optional.
Height Override	The height measurement for a SKU. The Height, Length, and Width values are used to determine the cubic volume of an item/SKU. You can enter the height in feet or centimeters, or any other measurement as long as it is consistent. Numeric, 3 positions; optional.
Length Override	The length measurement for a SKU. The Height, Length, and Width values are used to determine the cubic volume of an item/SKU. You can enter this value in feet or centimeters, or any other measurement as long as it is consistent. Numeric, 3 positions; optional.
List Price	The system uses this price when you process item to item transfers (inventory transaction code = *G*). Numeric, 13 positions with a 2-place decimal; optional (required if you process item to item transfers).
Long SKU Color	A code, typically used in a retail environment, that represents the color portion of the long SKU code. Used for reporting purposes. Numeric, 5 positions; optional.
Long SKU Size	A code, typically used in a retail environment, that represents the size portion of the long SKU code. Used for reporting purposes. Numeric, 5 positions; optional.
Long SKU Width	A code, typically used in a retail environment, that represents the width portion of the Long SKU code. Used for reporting purposes. Numeric, 5 positions; optional.
Lowest Price	The lowest recommended sale price for the item/SKU; however, the item/SKU can be sold at a lower price. Numeric, 13 positions with a 2-place decimal; optional.

Field	Description
Max Qty for Location	The SKU's recommended maximum number of units to be stored in the primary pick location. The primary pick location refers to the code that you pass in the *Location* field. Numeric, 7 positions; optional.
Max Qty for Warehouse	The SKU's recommended maximum number of units for the warehouse specified in the *Whs (Warehouse)* field. Numeric, 7 positions; optional.
Min Qty for Location	The SKU's recommended minimum quantity to be stored in the primary pick location. The primary pick location refers to the code that you pass in the *Location* field. Numeric, 7 positions; optional.
Min Qty for Warehouse	The SKU's recommended minimum number of units for the warehouse specified in the *Whs (Warehouse)* field. Numeric, 7 positions; optional.
SKU Gift Certificate	This field is not implemented; enter *N* for this field. Alphanumeric, 1 position; optional.
Reserve Qty Limit	If the order quantity exceeds this amount, the system will not reserve the item/SKU and will display the Backorder Reason. Numeric, 7 positions; optional.
Restrict Orders	Indicates whether you can accept an order for this item/SKU in Order Entry and whether demand is captured. • *Y* = The operator cannot accept an order for this item/SKU. • *N* = The operator can accept an order for this item/SKU. If you leave this field blank, it defaults from the ***DFLT ITEM Item/SKU*. If the ***DFLT ITEM Item/SKU* does not exist, the system defaults this field to *N*. Alphanumeric, 1 position; optional.
Retail Ref #	Represents the retail reference or alternate product number. You can use this value to cross-reference an item/SKU to an external system, such as through the *Generic Inventory Transaction Upload* or the *Generic Order Interface (Order API).* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Numeric, 15 positions; optional.
Selling Weight Override	The system uses this value to calculate the freight charge on a SKU when the *Freight method* on the order is *By Item* or *Flat Rt/Item*. Overrides the selling weight, if any, defined at the base item level. Numeric, 7 positions with a 3-place decimal; optional.

Field	Description
Short SKU	A unique number that the system assigns to all items and SKUs unless you pass a value for the item/SKU in the item upload. • For add *01* (Item/SKU) records, leave this field blank to have the system assign a unique short SKU number to the item/SKU. The system does not default the short SKU defined for the ***DFLT ITEM Item/SKU* to a new item/SKU. • For change *01* (Item/SKU) records, create the ***DFTCHG Item/SKU* so that existing items/SKUs retain their assigned short SKU number; however, even if you pass a short SKU number for a change 01 record, the system retains the existing short SKU number that is assigned to the item/SKU. Numeric, 7 positions; optional.
User field 1	An informational field you can use according to your organization's specific requirements. Alphanumeric, 10 positions; optional.
User field 2	An informational field you can use according to your organization’s specific requirements. Alphanumeric, 10 positions; optional.
User field 3	An informational field you can use according to your organization’s specific requirements. Alphanumeric, 10 positions; optional.
Weight Override	The actual shipping weight of the SKU. The system may use this value to calculate carton weights and to determine your shipping charges if you perform manual confirmation and use cubing. Numeric, 7 positions with a 3-place decimal; optional.
Width Override	The width measurement for an SKU. The Height, Length, and Width values are used to determine the cubic volume of an item/SKU. You can enter this value in feet or centimeters, or any other measurement as long as it is consistent. Numeric, 3 positions; optional.
Sale Credit Flag	Not implemented. Alphanumeric, 1 position; optional.
Harmonize Code	A code that prints on customs documents for international shipments. Alphanumeric, 16 positions; optional.
Coord group (Coordinate group items?)	A code that may be assigned to item/SKUs to ensure that certain item/SKUs ship together when ordered together. Numeric, 3 positions; optional.
Average Cost	A method to determine the cost of an item. Not currently implemented. Numeric, 13 positions with a 4-place decimal; optional.
FIFO Cost	A method to determine the cost of an item. Not currently implemented. Numeric, 13 positions with a 4-place decimal; optional.
LIFO Cost	A method to determine the cost of an item. Not currently implemented. Numeric, 13 positions with a 4-place decimal; optional.
Standard Cost	The defined cost of the item. The system does not calculate a new standard cost automatically. Numeric, 13 positions with a 4-place decimal; optional.

Field	Description
Second language description	Not currently implemented. Alphanumeric, 40 positions; optional.
VAT exempt flag	Indicates if the item is exempt from VAT. • *Y* = The item is exempt from VAT. • *N* = The item is not exempt from VAT. If you leave this field blank, it defaults from the ***DFLT ITEM Item/SKU*. If the ***DFLT ITEM Item/SKU* does not exist, the system defaults this field to *N*. Alphanumeric, 1 position; optional.
Second Compatibility	A user-defined code assigned to the item. Alphanumeric, 3 positions; optional.
Hidden Tax Amount	The amount to include in the Hidden tax field for an item subject to VAT. Numeric, 13 positions with a 2-place decimal; optional.
Hidden Tax Percent	The percentage to use when calculating hidden tax for an item subject to VAT. See *How Hidden Tax is Calculated by Percentage* for more information. Numeric, 5 positions with a 2-place decimal; optional.
Suppress B/O Card	Indicates whether to produce a backorder card for the SKU. Valid values are: • *Y* = Suppress normal backorder card generation for this item. • *N* = Do not suppress normal backorder card generation. If you leave this field blank, the system defaults this value from the ***DFLT ITEM Item/SKU*. If the **DFLT ITEM (or NA SKU for the **DFLT ITEM) does not exist, the system defaults this value from the *Unconditional Suppression of Backorder Card (F19)* system control value. If this system control value is blank, the system defaults this field to *N*. Alphanumeric, 1 position; optional.
Projected Returns	The number of units you expect to receive in returns for the item. Numeric, 7 positions; optional.
User Field 4	An informational field you can use according to your organization's specific requirements. Alphanumeric, 5 positions; optional.
User Field 5	An informational field you can use according to your organization's specific requirements. Alphanumeric, 5 positions; optional.
Returnable	Indicates whether the item is eligible for return; informational only. Valid values are: • *Y* = The item is eligible for return • *N* (default) = This item is not eligible for return If you leave this field blank, it defaults from the ***DFLT ITEM Item/SKU*. If the ***DFLT ITEM Item/SKU* does not exist, the system defaults this field to *N*. Alphanumeric, 1 position; optional.

Field	Description
Retail X-Ref #	Represents the UPC (Universal Product Code) or Retail Reference number for the SKU. Used for informational purposes. If you want the system to create an item UPC code, you must enter values in the *Fields for 08 Item UPC record type*. Numeric, 10 positions; optional.
L/S Style	The long SKU style defined for the SKU. If the *Require L/S Style (I94)* system control value is *selected*, the system requires a long SKU style when creating or updating a SKU and validates that the long SKU style code defined at the item level and SKU level are both unique values. **Note:** If the *Use Retail Integration (H26)* system control value is *selected*, the system ignores the setting of the *Require L/S Style (I94)* system control value. In this situation, the system requires a long SKU style when creating or updating an item, but it does not have to be unique. Alphanumeric, 20 positions; optional.
L/S Vendor	A user-defined field that represents the long SKU vendor for the item/SKU. Alphanumeric, 7 positions; optional.
Excl Store Restock	This field is not implemented; enter *N* in this field. Alphanumeric, 1 position; optional.
Original Retail Price	The original price of the item at the retail store. Numeric, 13 positions with a 2-place decimal; optional.
GTIN	Not currently implemented. Numeric, 14 positions; optional.
Commodity Code	Not currently implemented. Numeric, 8 positions; optional.
ABC Code	This field is not implemented. Alphanumeric, 1 position; optional.
Carton ID #	The type of carton in which this item must ship. **Note:** This field is not currently implemented. Numeric, 2 positions; optional.

Field	Description
Freq Code (Frequency code)	This code classifies the performance of a SKU based on the number of picks generated for the SKU over a month's time. **Note:** This field is not currently implemented. Alphanumeric, 1 position; optional.
Whs (Warehouse)	A code that represents a warehouse where this item is stocked. Warehouse codes are defined in and validated against the Warehouse table. See *Creating and Maintaining Warehouses (WWHS)*. If the ***DFLT ITEM Item/SKU* does not exist and you do not define a valid warehouse, the system defaults the warehouse defined in the *Default Warehouse (A04)* system control value. Numeric, 3 positions; required.
Location	A code that represents an area within the warehouse that contains the item/SKU. Sometimes referred to as the “primary primary.” Validated against the Location table. Alphanumeric, 7 positions; optional.
Soldout control code	A code that represents how you determine when an item/SKU is soldout. You can define a value in the *Default Soldout Control Code (D72)* system control value to default automatically when you create items and SKUs; however, you can override this value. See *Working with Soldout Controls (WSLD)*. Alphanumeric, 2 positions; optional.
UOM Type	A standard by which an item/SKU is sold. Validated against the Unit of Measure table (see *Working with Units of Measure (WUOM)*). Defaults from the *Default Item Unit of Measure (B33)* system control value if you have not defined a default value in the ***DFLT ITEM Item/SKU* or the **DFLT ITEM does not exist. Alphanumeric, 3 positions; optional.
SEO Code	SKU element 1. Alphanumeric, 4 positions; optional.
SEW Code	SKU element 2. Alphanumeric, 4 positions; optional.
SET Code	SKU element 3. Alphanumeric, 4 positions; optional.
Status	A code that represents a SKU's status, such as obsolete, discontinued, sold out, etc. This information is used for inventory reporting purposes. The status defined at the SKU level overrides the status defined at the base item level. See *Working with Item Status (WIST)* for background. Alphanumeric, 1 position; optional.

Field	Description
Category	A code assigned to the SKU to classify and group like item/SKUs for use in the Item Relationships function. Validated against the Item Category table; see *Working with Item Category Codes (WITG)*. Alphanumeric, 4 positions; optional.
Prep Code	A code used to indicate any special preparation or handling required for the SKU. Informational only. **Note:** This field is not currently implemented. Alphanumeric, 2 positions; optional.
Country of Origin	A code representing the country where the SKU originated. Country codes are defined in and validated against the Country table; see *Setting Up the Country Table (WCTY)*. Alphanumeric, 3 positions; optional.
L/S Class	A code to group items into classes for reporting purposes. Long SKU classes are defined in and validated against the Long SKU Class table; see *Working with Long SKU Classes (WLSC)*. If the *Use Retail Integration (H26)* system control value is *selected*, long SKU classes are linked to long SKU departments and are called retail classes. Retail classes are department specific whereas regular long SKU classes are unique and remain constant across departments. For this reason, when the *Use Retail Integration (H26)* system control value is *selected*, you can only enter a retail class in this field that is assigned to the base item's long SKU department. If you enter a long SKU class that is not linked to the base item's long SKU department, the system will not let you proceed and displays an error message: `L/S Class (xxxx) was not found in L/S Department (xx).` Retail classes are defined in and validated against the Retail Class table; see the *Work with Retail Class Screen* for more information. Numeric, 4 positions; optional.
Zone Reservation	A code assigned to weather-sensitive items/SKUs such as plant stock to insure that the items will ship to different regions of the country within time windows suited to the regions. See *Shipping Zone Reservation Overview*. Alphanumeric, 4 positions; optional.

Field	Description
OROB Eligible	Indicates whether to include this item when: 1. sending item and inventory information from Order Administration to Order Orchestration through a stored procedure; however, this flag does not control whether to include the item through an API that uses an XML message, such as the *Generic Item Download API* or the *Generic Inventory Download API*. For more information see the Web Services Guide on My Oracle Support (ID 2953017.1). 2. sending backordered order lines to Order Orchestration for fulfillment. See *Order Orchestration Integration* for an overview, and see *Rules for Submitting Backorders to Order Orchestration* for more rules that govern eligibility for Order Orchestration. Valid values: • *Y* = Include this item when you use a stored procedure to send item and inventory information to Order Orchestration; also, the item is eligible to be sent to Order Orchestration for fulfillment, provided it meets the other *Rules for Submitting Backorders to Order Orchestration*. • *N* = Do not include this item when you use the stored procedure to send item and inventory information to Order Orchestration; also, the item is not eligible to be sent to Order Orchestration for fulfillment. If you leave this field blank, it defaults from the ***DFLT ITEM Item/SKU*. If the ***DFLT ITEM Item/SKU* does not exist, the system defaults this field to *Y*. Alphanumeric, 1 position; optional.
ITM Image Link	The URL to the location of the item image on the external image hosting application. No validation. See *Item Image/Info Link Screen*. Updates the ITM Image Link field in the Item table. Alphanumeric, 256 positions; optional.
ITM Info Link	The URL to the location of the item information on the external image hosting application. No validation. See *Item Image/Info Link Screen*. Updates the ITM Info Link field in the Item table. Alphanumeric, 256 positions; optional.
SKU Image Link	The URL to the location of the SKU image on the external image hosting application. No validation. See *Item Image/Info Link Screen*. Updates the SKU Image Link field in the SKU table. Alphanumeric, 256 positions; optional.
SKU Info Link	The URL to the location of the SKU information on the external image hosting application. No validation. See *Item Image/Info Link Screen*. Updates the SKU Info Link field in the SKU table. Alphanumeric, 256 positions; optional.
ITM Tag Type	This field is not implemented. Alphanumeric, 2 positions; optional.
Fields for 03 Item Offer record type	See *Item Offer errors*.

Field	Description
Offer for Item Offer	The code for the offer (catalog) in which the item/SKU appears. Validated against the Offer table. See *Working with Offers (WOFR)*. Alphanumeric, 3 positions; required (if other information is entered).
Cost	Not implemented. Numeric, 7 positions with a 2-place decimal; optional.
Expected Return Pct	Not implemented. Numeric, 5 positions with a 2-place decimal; optional.
G/W Flag	Indicates whether this SKU is eligible for gift wrap. Valid values: 1. *Y* = The item/SKU can be gift wrapped. 2. *N* = In this offer, the item/SKU cannot be gift wrapped. If you leave this field blank, the system defaults *Y* to this field if the *Gift Wrap Default (F07)* system control value is *selected*; otherwise, this field defaults to *N*. Alphanumeric, 1 position; optional.
G/W Price	The price for gift wrapping the item. The G/W field must be *Y*. The gift wrap price will be charged for each unit of this SKU that is gift wrapped. Numeric, 13 positions with a 2-place decimal; optional.
Page #	Not implemented. Numeric, 5 positions; optional.
Projected Units	Not implemented. Numeric, 7 positions; optional.
S/H Price	The price that will be charged for special handling. Numeric, 13 positions with a 2-place decimal; optional.
S/H Flag	Indicates whether this item is eligible for any type of special handling in this offer (such as, monogramming, hemming, etc.). • *Y* = This item is eligible for special handling. • *N* = This item is not eligible for special handling. If you leave this field blank, the system defaults this field to *N*. Alphanumeric, 1 position; optional.
Square Inches	Not implemented. Numeric, 5 positions with a 2-place decimal; optional.
Freight	The freight amount to be charged for this item/SKU. Multiplied by the quantity ordered to determine the freight charge for this item. Used only if the *Freight method* field for the Source Code table is set to *By Item* or *Flat Rt/Item*. Numeric, 13 positions with a 2-place decimal; optional.
Hidden Freight	Used only with item/SKU level freight methods, such as: *Flat Rt/Item*, *Flat Rt/Qy*, *Flat Rt/Itm Src*, and *By Item*. Hidden freight represents the portion of the item's catalog price that is used for freight. Numeric, 13 positions with a 2-place decimal; optional.
Spread	Not implemented. Alphanumeric, 3 positions; optional.

Field	Description
Volume Discount Y/N	Indicates whether this item is eligible for an end-of-order discount that will be applied when you accept the order during Order Entry. • *Y* = The item/SKU is eligible for the volume discount. • *N* = The item/SKU is not eligible for the volume discount. If you leave this field blank, the system defaults this field to *N*. See *Item Volume Discounting*. Alphanumeric, 1 position; optional.
Coupon Disc %	Represents the amount that is subtracted from the price when the SKU is ordered from this offer. Numeric, 7 positions with a 2-place decimal; optional.
Coupon Effective Date	The date the coupon is effective until (i.e., the date expires). Numeric, 7 positions (CYYMMDD format); optional.
Feature/ option	Indicates whether the item is considered a featured or optional item in a depiction. Valid values are: • *F* = Item is the featured item in the depiction • *O* = Item is an optional item in the depiction Alphanumeric, 1 position; optional.
Pickup/new	Indicates whether the item has been carried over from a previous offer or is new to your product offerings. Valid values are: • *P* = Item is a pickup item, previously sold in an offer • *N* = Item is a new addition to your offer Alphanumeric, 1 position; optional.
Pop Up Message 1-4	For optional message lines. Alphanumeric, 30 positions each; optional.
Warranty Item?	Indicates whether the item in this offer is a warranty item. Valid values are: • *Y* = The item in this offer is a warranty item. When an operator adds this item to an order in order entry or order maintenance, the system adds the item to the order at no charge. • *N* = The item in this offer is not a warranty item. If you leave this field blank, the system defaults this field to *N*. Alphanumeric, 1 position; optional.
Require Add Reason	Indicates whether an *Order addition reason code* is required when the item in this offer is added to an order in order entry or order maintenance. Valid values are: • *Y* = The item in this offer requires an add reason code when the item is added to an order in order entry or order maintenance. • *N* = The item is this offer does not require an add reason code when the item is added to an order in order entry or order maintenance. If you leave this field blank, the system defaults this field to *N*. Alphanumeric, 1 position; optional.
Curve Code	Not implemented. Numeric, 3 positions; optional.

Field	Description
Add'l chg code	The additional charge code associated with the type of special handling you are offering for the item. The system validates that the additional charge code is defined as special handling, with a Type of standard or custom; the system handles each type in a different way. See *Special Handling Overview* for more information. Alphanumeric, 2 positions; optional.
Add-On Code	Not currently implemented. Alphanumeric, 3 positions; optional.
Fields for 04 SKU Offer record type	See *SKU Offer errors*.
Offer for SKU Offer	The code for the offer (catalog) in which the item/SKU appears. Validated against the Offer table. See *Working with Offers (WOFR)*. Alphanumeric, 3 positions; required (if other information is entered).
Cost	Not implemented. Numeric, 7 positions with a 2-place decimal; optional.
Expected Return Pct	Not implemented. Numeric, 5 positions with a 2-place decimal; optional.
G/W Flag	Indicates whether this SKU is eligible for gift wrap. Valid values: • *Y* = The item/SKU can be gift wrapped. • *N* = In this offer, the item/SKU cannot be gift wrapped. If you leave this field blank, the system defaults *Y* to this field if the *Gift Wrap Default (F07)* system control value is *selected*; otherwise, this field defaults to *N*. Alphanumeric, 1 position; optional.
Page #	Not implemented. Numeric, 5 positions; optional.
Projected Units	Not implemented. Numeric, 7 positions; optional.
S/H Price	The price that will be charged for special handling. Numeric, 13 positions with a 2-place decimal; optional.
S/H Flag	Indicates whether this item is eligible for any type of special handling in this offer (such as, monogramming, hemming, etc.). • *Y* = This item is eligible for special handling. • *N* = This item is not eligible for special handling. If you leave this field blank, the system defaults this field to *N*. Alphanumeric, 1 position; optional.
Square Inches	Not implemented. Numeric, 5 positions with a 2-place decimal; optional.
G/W Price	The price for gift wrapping the item. The G/W field must be *Y*. The gift wrap price will be charged for each unit of this SKU that is gift wrapped. Numeric, 13 positions with a 2-place decimal; optional.

Field	Description
Freight	The freight amount to be charged for this item/SKU. Multiplied by the quantity ordered to determine the freight charge for this item. Used only if the *Freight method* field for the Source Code table is set to *By Item* or *Flat Rt/Item*. Numeric, 13 positions with a 2-place decimal; optional.
Hidden Freight	Used only with item/SKU level freight methods, such as: *Flat Rt/Item*, *Flat Rt/Qty*, *Flat Rt/Itm Src*, and *By Item*. Hidden freight represents the portion of the item's catalog price that is used for freight. Numeric, 13 positions with a 2-place decimal; optional.
Coupon discount %	Represents the amount that is subtracted from the price when the SKU is ordered from this offer. Numeric, 7 positions with a 2-place decimal; optional.
Coupon Effective	The date the coupon is effective until (i.e., the date expires). Numeric, 7 positions (CYYMMDD format); optional.
Volume disc?	Indicates whether this item is eligible for an end-of-order discount that will be applied when you accept the order during Order Entry. • *Y* = The item/SKU is eligible for the volume discount. • *N* = The item/SKU is not eligible for the volume discount. If you leave this field blank, the system defaults this field to *N*. See *Item Volume Discounting*. Alphanumeric, 1 position; optional.
Spread	Not implemented. Alphanumeric, 3 positions; optional.
Feature/ Option	Indicates whether the item is considered a featured or optional item in a depiction. Valid values are: • *F* = Item is the featured item in the depiction • *O* = Item is an optional item in the depiction Alphanumeric, 1 position; optional.
Pickup/New	Indicates whether the item has been carried over from a previous offer or is new to your product offerings. Valid values are: • *P* = Item is a pickup item, previously sold in an offer • *N* = Item is a new addition to your offer Alphanumeric, 1 position; optional.
Warranty Item?	Indicates whether the item/SKU in this offer is a warranty item. Valid values are: • *Y* = The item/SKU in this offer is a warranty item. When an operator adds this item/SKU to an order in order entry or order maintenance, the system adds the item to the order at no charge. • *N* = The item/SKU in this offer is not a warranty item. If you leave this field blank, the system defaults this field to *N*. Alphanumeric, 1 position; optional.

Field	Description
Required Add Reason?	Indicates whether an *Order addition reason code* is required when the item in this offer is added to an order in order entry or order maintenance. Valid values are: • *Y* = The item in this offer requires an add reason code when the item is added to an order in order entry or order maintenance. • *N* = The item is this offer does not require an add reason code when the item is added to an order in order entry or order maintenance. If you leave this field blank, the system defaults this field to *N*. Alphanumeric, 1 position; optional.
Curve Code	Not implemented. Numeric, 3 positions; optional.
Add'l chg	The additional charge code associated with the type of special handling you are offering for the item. The system validates that the additional charge code is defined as special handling, with a Type of standard or custom; the system handles each type in a different way. See *Special Handling Overview* for more information. Alphanumeric, 2 positions; optional.
Add-On Code	Not currently implemented. Alphanumeric, 3 positions; optional.
Fields for 05 Item Price record type	See *Item Price errors*.
Offer for Item Price	The code for the offer (catalog) in which the item appears. Validated against the Offer table. See *Working with Offers (WOFR)*. Alphanumeric, 3 positions; required.
Effective Date	The date the price or quantity break discount becomes valid. Numeric, 7 positions (CYYMMDD format); required.
Qty	The amount of an item that the customer must order to receive the discounted (quantity break) price. Numeric, 7 positions; required.
Associate Price	The price at which the item will be sold in this offer to associate customers. Numeric, 13 positions with a 2-place decimal; optional.
Price	The price at which the item will be sold in this offer, if no discounts are applied, and the order date is on or after the effective date. If the *Tax Included in Price (E70)* system control value is unselected, you must define a price; if this system control value is selected, you can define a price or tax inclusive price. Numeric, 13 positions with a 2-place decimal; required if SCV E70 is unselected.
Price Column	The pricing column associated with the price entered. In the Customer table, you may assign a customer to a pricing column. This means that the customer will be charged the column price, even if the customer does not order the number of units specified for the price break. Alphanumeric, 2 positions; optional.

Field	Description
Tax Inclusive Associate Price	The price at which the item will be sold in this offer to associate customers on orders subject to VAT. Numeric, 13 positions with a 2-place decimal; optional.
Tax Incl Price	The price at which the item will be sold in this offer on orders subject to VAT. When an order is subject to VAT, tax does not accumulate in the Tax bucket on the order; instead, the customer pays a tax-inclusive price for the items and VAT is included as a “hidden tax” on the order detail line. If the *Tax Included in Price (E70)* system control value is unselected, you must define a price; if this system control value is selected, you can define a price or tax inclusive price. Numeric, 13 positions with a 2-place decimal; optional.
No Charge?	Indicates whether this item/SKU is eligible for any type of special handling in this offer (such as, monogramming, hemming, etc.). • *Y* = The item/SKU is eligible for special handling. • *N* = The item/SKU is not eligible for special handling. **Note:** This field is not currently implemented. Alphanumeric, 1 position; optional.
Fields for 06 SKU Price record type	See *SKU Price errors*.
Offer SKU Price	The code for the offer (catalog) in which the SKU appears. Validated against the Offer table. See *Working with Offers (WOFR)*. Alphanumeric, 3 positions; required.
Effective Date	The date the price or quantity break discount becomes valid. Numeric, 7 positions (CYYMMDD format); required.
SKU Price Qty	The amount of a SKU that the customer must order to receive the discounted (quantity break) price. Numeric, 7 positions; required.
Associate Price	The price at which the SKU will be sold in this offer to associate customers. Numeric, 13 positions with a 2-place decimal; optional.
Price	The price at which the SKU will be sold in this offer, if no discounts are applied, and the order date is on or after than the effective date. If the *Tax Included in Price (E70)* system control value is unselected, you must define a price; if this system control value is selected, you can define a price or tax inclusive price. Numeric, 13 positions with a 2-place decimal; required if SCV E70 is unselected.
Price Column	The pricing column associated with the price entered. In the Customer table, you may assign a customer to a pricing column. This means that the customer will be charged the column price, even if the customer does not order the number of units specified for the price break. Alphanumeric, 2 positions; optional.

Field	Description
Tax Inclusive Associate Price	The price at which the SKU will be sold in this offer to associate customers on orders subject to VAT. Numeric, 13 positions with a 2-place decimal; optional.
Tax Incl Price	The price at which the SKU will be sold in this offer on orders subject to VAT. If the *Tax Included in Price (E70)* system control value is unselected, you must define a price; if this system control value is selected, you can define a price or tax inclusive price. Numeric, 13 positions with a 2-place decimal; optional.
No Charge?	Indicates whether this item/SKU is eligible for any type of special handling in this offer (such as, monogramming, hemming, etc.). • *Y* = The item/SKU is eligible for special handling. • *N* = The item/SKU is not eligible for special handling. **Note:** This field is not currently implemented. Alphanumeric, 1 position; optional.
Fields for 07 Vendor Item record type	See *Vendor Item errors*.
Vendor Number	A code that defines the supplier of an item. Defined in and validated against the Vendor table. See *Working with Vendors (WVEN)*. Numeric, 7 positions; required.
Item (Vendor item)	The code you use to identify a vendor item. If an item has SKUs, you must define the vendor item code at the SKU level. If you are creating a vendor item for a SKU, you must specify a *Key Type* that will be able to identify the SKU in Order Administration. For example, if you enter the *RS* key type and enter the base item's retail style number, you must also enter the SKU code of the SKU. If you are entering a change request, you cannot change the vendor item; instead, you need to create a new record. Alphanumeric, 20 positions; required.
Cubic Volume	The cubic volume of the item, as defined by the vendor; used for informational purposes only. Numeric, 5 positions; optional.
Description	The description of the item, as defined by the vendor. Alphanumeric, 30 positions; required.
Lead Days	The number of days it takes a vendor to deliver this item when it is ordered through a purchase order. Numeric, 3 positions; optional.
Message Line 1-3	An informational message that you can use for reporting purposes. Up to 3 lines of messages are available for free-form text, such as special packing instructions. Alphanumeric, 30 positions (each line); optional.

Field	Description
Min Qty	The minimum unit quantity of merchandise you are required to order from the vendor. Numeric, 7 positions; optional.
Price	Represents the vendor's list price for this item. Numeric,13 positions with a 4-place decimal; optional.
Ship Weight	The shipping weight of the item, as defined by the vendor. Numeric, 7 positions with a 3-place decimal; optional.
Vendor ord qty multiple	The number of units by which your order quantity must be divisible when you order this item from this vendor. Numeric, 5 positions; optional.
Ship Via	A code that represents the carrier used when shipping this item to your company. If you pass a vendor item PO ship via code, it defaults on a vendor item purchase order line automatically, but you can override it. Validated against the PO Ship Via table. Numeric, 2 positions; optional.
UOM Type (SKU)	The vendor's *Unit of measure* for an item (e.g. C12 = case of 12, GRS = gross). The system validates this unit of measure against the Unit of Measure table. Alphanumeric, 3 positions; optional.
Country of Origin	A code representing the country where the vendor item originated. Country codes are defined in and validated against the Country table; see *Setting Up the Country Table (WCTY)*. Alphanumeric, 3 positions; optional.
Fields for 08 Item UPC record type	See *Item UPC errors*.
UPC Type	The type of UPC code. Informational only. Valid values are: • *E13* = EAN-13, indicating a 13 position UPC code; however Order Administration does not validate the UPC length. • *E8* = EAN-8, indicating an 8 position UPC code; however, Order Administration does not validate the UPC length. • *UA* = UPC-A, indicating a 12 position UPC code; however Order Administration does not validate the UPC length. • *UE* = UPC-E, indicating a 6 position UPC code; however Order Administration does not validate the UPC length. Alphanumeric, 3 positions; required.
UPC	A UPC code defined for the item/SKU, including any leading zeros. *Example:* If the UPC code is *06012011*, the UPC code passed should be `06012011` and not `6012011`. Alphanumeric, 14 positions; required.
UPC Vendor Nbr	A user-defined code that identifies the supplier of the item/SKU UPC. Defined in and validated against the Vendor table. See *Working with Vendors (WVEN)*. Numeric, 7 positions; optional.

Field	Description
Fields for 09 Item Coordinate record type	See *Item Coordinate errors*.
Coordinate Item	The related item you are coordinating to the primary item (identified in the *Item* field) for cross-selling purposes. Item codes are defined in and validated against the Item table. **Note:** If you specify a *SKU* in an item coordinate request, the system ignores it; item coordinates are assigned to the base item only, not to individual SKUs. Alphanumeric, 12 positions; required.
ICN Coordinate Item Type	A code representing a type of item coordinate, such as mandatory or optional. If you do not specify a coordinate type in a change request, the system clears the existing coordinate type assignment. Coordinate type codes are defined in and validated against the Item Coordinate Type table; see *Working with Item Coordinate Types (WICT)*. Alphanumeric, 2 positions; optional.
Message	A persuasive or descriptive message to display on the item coordinate pop-up window in order entry. If you do not specify a message in a change request, the system clears the existing message. Alphanumeric, 70 positions; optional.
ICN Coordinate SKU	The coordinate item's unique characteristics, such as its color or size. Required if the coordinate item has SKUs. 1. If you define a SKU for the coordinate item that is not already defined for the primary item, the system creates a new Item Coordinate record for the primary item. 2. If you define a SKU for the coordinate item that is already defined for the primary item, the system updates the Coordinate type and Message values for the existing Item Coordinate record. Alphanumeric, three 4-position fields; required if the item has SKUs.

Work with Retail Item Upload Screen

Purpose: Use this screen to process batch item upload records, then review and correct the records with errors.

All batch records that you pass to the *RI Item Upload Table (RIIUPP)* using the process described under *RI Item Upload Process* or *Oracle Retail Merchandising Foundation Cloud Service (RMFCS) and Oracle Retail Pricing Cloud Service (RPCS) Integration* display on this screen with a blank status. You can process the batch by selecting *Process File* to submit the RI_UPLD job. Any records that are in error remain on this screen, and the system places the record(s) in error status (*E*).

How to display this screen: Enter *RIIU* in the Fast Path at the top of any menu or select Work with Retail item Upload from a menu.

Field	Description
Date	The date you created the item upload record. Numeric, 6 positions; optional.
Record type	Indicates the item/SKU information you want to add, change, or delete. Valid values are: • Item/SKU • Item Offer • SKU Offer • Item Price • SKU Price • Vendor Item • Item UPC • Item Coordinate Fields in the RI Item Upload table are categorized by record type and this code determines the group of item/SKU information fields that the item upload program evaluates to create or update an item/SKU. **Note:** Although the record type description is listed on this screen, each record type is identified by a numeric code in the table. For example, an Item/SKU is record type *01*. *Example:* If you want to change a SKUs price information, you enter a SKU Price record type. Even if all the fields in the item upload record are populated for that SKU, the system will only pass information in the nine SKU price fields. **Note:** If you maintain values (a change *Request Type*) for different record types and you leave blank fields in the item upload record, the system updates the associated tables with blanks. **Item/SKU Record Type (01)** When passing information to Order Administration, you must build upon values passed in this record type. For example, you cannot create a vendor item record type until you have first created the item/SKU record type).

Field	Description
	The system considers fields associated with this record type. Of these fields, the following are required when the *Use Retail Integration (H26)* system control value is *selected*: • L/S style • L/S vendor • Item description • L/S class • L/S department • L/S division (if the *Require Long SKU Division with Long SKU Department (E85)* system control value is *selected*, AND you are passing a new L/S Department value) • Item class (if the *Require Item Class in Work with Items (F06)* system control value is *selected*) See *Fields for 01 Item/SKU record type*. Creating an item/SKU record is the only instance where the item and SKU code fields are evaluated outside of the *Key Type*, and the only instance where the item identifier values for the key type do not have to be specified. *Example:* When creating an item/SKU (an add *Request Type* for an *01* record type), you must pass an *Item* code unless you have the *Auto Assign Item # (D46)* system control value *selected*. If you do not enter an item code, a message indicates: `Missing Item/SKU for Key Type IT`. You must also pass a *SKU* code in the above situation (an add *Request Type* for an *01* record type) when the *Allow SKUs* field is *selected*. **Note:** When you pass an add request for the *01* record type and leave various fields blank, the system tries to default values from the **DFLT ITEM or system control values. See *Creating Default and Change Item/SKU Upload Values: **DFLT ITEM and **DFTCHG*. **Item Offer Record Type (03)** The system considers fields associated with this record type. The Offer for item offer field is required. See *Fields for 03 Item Offer record type*. **SKU Offer Record Type (04)** The system considers fields associated with this record type. The SKU offer for SKU offer field is required. See *Fields for 04 SKU Offer record type*.

Field	Description
	Item Price Record Type (05) The system considers the fields associated with the item price record type. These fields are required: • Offer for item price • Effective date • Quantity • Price See *Fields for 05 Item Price record type*. You cannot create an item price record until you have created an item offer record. **SKU Price Record Type (06)** The system considers the fields associated with the SKU price record type. These fields are required: • Offer for SKU price • SKP effective date • SKP quantity • SKP price See *Fields for 06 SKU Price record type*. You cannot create a SKU price record without first creating a SKU offer record. **07 Vendor Item Record Type** The system considers the fields associated with the vendor item record type. These fields are required: • Vendor for vendor item record • item code • Description See *Fields for 07 Vendor Item record type*. If the item for which you are creating a vendor item has SKUs, you must enter a code in the *SKU* field for the item upload record. **08 UPC Record Type** The system considers the fields associated with the UPC record type. The UPC type and UPC code are required. See *Fields for 08 Item UPC record type*. **09 Item Coordinate Record Type** The system considers the fields associated with the item coordinate record type. The Item coordinate is always required, and the Coordinate SKU is required if the coordinate item has SKUs. See *Fields for 09 Item Coordinate record type*. **Optional.**

Field	Description
Req type (Request Type)	A code that defines whether you create or change item/SKU information. Valid values are: • *Add* = Add record; however, if the system finds a record in the Order Administration database that matches the information in the RI Item Upload record, the system updates the existing record. • *Maintain* = Change record; however, if the system cannot find a record in the Order Administration database that matches the information in the RI Item Upload record, the system creates a new record. • *Blank* = The system compares the information in the RI Item Upload record to the existing records in the Order Administration database. • If the system cannot match the RI Item Upload record to an existing record in the Order Administration database, the system considers the RI Item Upload record an add request. • If the system can match the RI Item Upload record to an existing record in the Order Administration database, the system considers the RI Item Upload record a change request. **Add Request Type** You can pass numerous add requests for the same item/SKU with these record types: • *03* (item offer) • *04* (SKU offer) • *05* (item price) • *06* (SKU price) • *07* (vendor item) • *08* (UPC record type) • *09* (item coordinate) You can also pass multiple add requests for the same item (record type *01*) as long as you are creating a new SKU for that base item. See the *Record Type* field description for more information. When adding an item/SKU (*01* record type), the system tries to default values whenever you leave a record type *01* field blank. The system looks to the **DFLT item and system control values to default values whenever possible. See *Creating Default and Change Item/SKU Upload Values: **DFLT ITEM and **DFTCHG*. **Change Request Type** You can pass multiple change requests for all record types; however, the fields associated with the specified record type are overwritten with the most recent information you pass for that record type. Do not pass a change request trying to update only one or two fields.

Field	Description
	Example: You want to change the effective date for a SKU price record (*C* request type, *06* record type). Assuming you enter identifier Key Type values and the system can find the SKU associated with the item upload record, if you enter the required fields for a SKU price record, updating the effective date but you leave the other fields that the system considers for the SKU price Record Type blank, the system updates the table with the values you entered in the required fields, and overwrites the rest of the data in the table with blanks. **Note:** The system overwrites data from blank fields passed in change requests for every record type except the *01* item/SKU record type. With this record type, the system defaults values whenever possible, either from the **DFLT ITEM or from system control values. See *Creating Default and Change Item/SKU Upload Values: **DFLT ITEM and **DFTCHG*. Optional.
Key type (IUP Key Type)	Defines the field values the system evaluates in order to identify the Order Administration item or SKU associated with an item upload record. Valid value is *Item/SKU*. The Item and SKU fields identify the item and SKU associated with the item upload record. The Item field is required and optionally the SKU field if you want to change information for a specific SKU. If the item contains SKUs and you do not enter a SKU code, the system maintains the base item for an item-level Record Type. A message indicates if you do not enter a code in the Item and SKU fields. Optional.
Key	The information that the system/translation program retrieved to identify the item or SKU associated with the item upload record. If the system maps the record to an item/SKU within Order Administration, the item/SKU's full information is shown here. Alphanumeric, 30 positions; display-only.

Field	Description
Sts (Status)	The status of the item upload record. Valid values are: • *Unprocessed* or blank = The item upload record is waiting to be processed. • *Batch Selected* = The item upload record contains the *Record Type* that is currently selected to process. • *In Process* = The item upload record is part of the batch of 1000 records that is currently being processed. • *Other Updates* = The item upload record is being processed by the secondary job *RISECU* that creates item download triggers and data warehouse triggers. • *Deleted* = The item upload record will be deleted from the table. • *Error* = The item upload record contains errors. • *Processed* = The item upload record has been processed. When you pass records to the RI Item Upload table, the Upload Translation program creates unprocessed records that display on the *Work with Retail Item Upload Screen* with a blank *Sts (Status)* field. When you select *Process File* to process and edit the item upload records, the system updates all records with the appropriate status. Only records in *Error* status remain visible at the Work with Retail Item Upload Screen so that you can correct them. Optional.

Screen Option	Procedure
Process item upload records	Select *Process File* to edit and process batch item upload records. See *RI Item Upload Process* for more information on how the system edits and populates the tables. The system submits the *RI_UPLD* job. *Periodic function:* You can also schedule this process to run periodically by setting up the RIUPLD function using the PFR0084 program. See *Scheduling Jobs* for background.
Change an item upload record	Select *Change* for an item upload record to advance to one of the *Change Item Upload Screens*.

Note:

You cannot change an item upload record if its status is *B* (Batch Selected), *I* (In Process), *S* (Other Updates) or *P* (Processed).

Screen Option	Procedure
Delete an item upload record	Select *Delete* for an item upload record to delete it. When you process the batch (select *Process File*), the system deletes the item upload record from the RI Item Upload table. **Note:** You cannot delete an item upload record if its status is *B* (Batch Selected), *I* (In Process), *S* (Other Updates) or *P* (Processed).
Display an item upload record	Select *Display* for an item upload record to advance to one of the *Display Item Upload Screens*.
Errors	Select *Errors* for an item upload record to advance to the *Work with Retail Item Upload Errors Screen*.
Delete all records that currently exist in the *RI Item Upload Table (RIIUPP)*, across all companies	Select *Delete All*. At the Are you sure you want to delete? window, select *Delete* to delete all records; otherwise, select *Exit* to cancel.
Print an item upload error report	Select *Print Error Report* to print the *Item Upload Error Report*. The system submits the *RI_ERROR* job.

Change Item Upload Screens

Purpose: Use these screens to correct batch item upload records with errors.

The system displays different information on the Change screens based on the information in the item upload record. For example, vendor item information is indicated for an item upload record containing vendor item information.

E2 Key screen: If you do not enter one of the keys to the table for the item upload record, you advance to an E2 Key Screen and are not able to advance to these screens to correct the errors.

Note:

You cannot change an item upload record if its status is *B* (Batch Selected), *I* (In Process), *S* (Other Updates) or *P* (Processed).

The following types of change screens exist:

- *Change Item Upload - Item/SKU Screens*
- *Change Item Upload - Item Offer Screens*
- *Change Item Upload - SKU Offer Screens*
- *Change Item Upload - Item Price Screen*
- *Change Item Upload - SKU Price Screen*

- *Change Item Upload - Vendor Item Screen*
- *Change Item Upload - Item UPC Screen*
- *Change Item Upload - Item Coordinate Screen*

Change Item Upload - Item/SKU Screens

Purpose: Use these screens to work with item upload records containing item/SKU information (*01* Item/SKU record type).

Default values:

- If you use the ***DFLT ITEM Item/SKU* to default values, the system does not default these values until you correct any errors.
- If you use the ***DFTCHG Item/SKU* to keep the existing values for an item/SKU and only update the fields defined in the item upload, the system defaults the retained values to the Change Item Upload - Item/SKU screens.

For field descriptions see *Keys to the table: fields that are required for all record types* and *Fields for 01 Item/SKU record type*.

Change Item Upload - Item Offer Screens

Purpose: Use these screens to work with item upload records containing item/offer information (*03* record type).

For field descriptions see *Keys to the table: fields that are required for all record types* and *Fields for 03 Item Offer record type*.

Change Item Upload - SKU Offer Screens

Purpose: Use these screens to work with item upload records containing SKU/offer information (*04* record type).

For field descriptions see *Keys to the table: fields that are required for all record types* and *Fields for 04 SKU Offer record type*.

Change Item Upload - Item Price Screen

Purpose: Use this screen to work with item upload records containing item/price information (*05* record type).

For field descriptions see *Keys to the table: fields that are required for all record types* and *Fields for 05 Item Price record type*.

Change Item Upload - SKU Price Screen

Purpose: Use this screen to work with item upload records containing SKU/price information (*06* record type).

For field descriptions see *Keys to the table: fields that are required for all record types* and *Fields for 06 SKU Price record type*.

Change Item Upload - Vendor Item Screen

Purpose: Use this screen to work with item upload records containing vendor/item information (*07* record type).

For field descriptions see *Keys to the table: fields that are required for all record types* and *Fields for 07 Vendor Item record type*.

Change Item Upload - Item UPC Screen

Purpose: Use this screen to work with item upload records containing item/UPC information (*08* record type).

For field descriptions see *Keys to the table: fields that are required for all record types* and *Fields for 08 Item UPC record type*.

Change Item Upload - Item Coordinate Screen

Purpose: Use this screen to work with item upload records containing item coordinate (*09* record type).

For field descriptions see *Keys to the table: fields that are required for all record types* and *Fields for 09 Item Coordinate record type*.

Display Item Upload Screens

To display: Select *Display* for an item upload record at the *Work with Retail Item Upload Screen* to advance to one of the Display Item Upload Screens. The *Record Type* of the item upload record determines the category of information that is indicated. See the *Change Item Upload Screens* for the different types of screens that display and see *RI Item Upload Table (RIIUPP)* for an explanation of the fields.

Work with Retail Item Upload Errors Screen

Purpose: Use this screen to review all errors associated with an item upload record, to review the values you passed for the keys to the table such as the created date, record type, request type, and key type, and to review the key information the translation program found for an Order Administration item associated with the item upload record.

Once you perform the *RI Item Upload Process* by selecting *Process* for the item upload batch at the *Work with Retail Item Upload Screen*, all item upload records that contain errors display in three places:

- the Retail Integration Item Upload Error table
- the *Item Upload Error Report*
- the *Work with Retail Item Upload Screen*

How to display this screen: Select *Errors* for an item upload record at the *Work with Retail Item Upload Screen*.

The top portion of the screen displays the key information you passed to the item upload table for the item upload record. See *Work with Retail Item Upload Screen* for descriptions of these fields.

> **Note:**
>
> If you do not enter values for all the *Keys to the table: fields that are required for all record types*, you will receive an error message displaying which value(s) you are missing. However, you cannot change these values here. You must delete the item upload record, and re-send it with the required corrections.

Retail Item Upload Errors

The following table lists some of the most common errors the Retail Item Translation Program and the Retail Integration Edit Program find during *RI Item Upload Process*.

Types of errors include:

- *Basic errors*
- *Item errors*
- *SKU errors*
- *Item Offer errors*
- *SKU Offer errors*
- *Item Price errors*
- *SKU Price errors*
- *Vendor Item errors*
- *Item UPC errors*
- *Item Coordinate errors*

Error Code	Error Message	Problem
Basic errors		See *Keys to the table: fields that are required for all record types* and *Fields for 01 Item/SKU record type*.
IA	Invalid Season for Item.	The *Season* field contains an invalid value.
IB	SKU Group can only be entered for items which have SKUs.	The *SKU Group* field must be blank if the item is not SKUed.
IC	Item Drop ship and Non-inventory are mutually exclusive.	The *Drop Ship*field is *selected* and the item is a non-inventory item.
ID	Item Drop ship and Kit Type 'S' are mutually exclusive.	The *Drop Ship* field is *selected* and the item is a set item.
IE	Entity required.	The *Entity Number* field is required.
IF	Item Long SKU Style required.	The *Long SKU Style* field is required for the item.
IG	Item Long SKU Vendor required.	The *Long SKU Vendor* field is required for the item.

Error Code	Error Message	Problem
IH	Quantity must be limited to 99999.	The *Qty Threshold* field must be less than or equal to 5 positions.
GA	Invalid Company	The *Company* does not exist.
GB	Company required	The *Company* is required.
GC	Item required.	The *Item* is required because the system could not identify the item based on the information passed for the RI Item Upload record.
GD	Invalid Item	You tried to add an 03-08 record type without first creating the item/SKU (01 record type).
GE	SKU is required for this record type.	The *SKU* is required.
GF	Invalid record type for an item without skus.	The *Record Type* is invalid for the item.
GG	Invalid SKU.	The *SKU* is invalid.
GH	Invalid record type.	The *Record Type* is invalid.
GI	Invalid request type.	The *Request Type* is invalid.
IN	Change of Allow SKUs is not allowed.	You cannot change the *Allow SKUs* field to *N* because SKUs exist.
IO	Invalid SVC code	You entered an invalid value in the *SVC type* field. • Valid values are: • 1. *blank* (default) = The item is not a stored value card. 2. *P* = The stored value card item is a physical card. 3. *E* = The stored value card is a physical card and, as soon as the stored value card is processed through billing, the system sends an email notification to the ship to customer on the order, notifying the customer that a stored value card has been purchased and is in the process of being delivered. 4. *V* = The stored value card is a virtual (non-physical) card.
IP	Item L/S Style is Not Unique	The *Require L/S Style (I94)* system control value is *selected* and the *Long SKU Style* defined at the item level is also assigned to another item or SKU.
K1	Missing company	The *Company* field requires a value.
K2	Missing date	The *Record Created Date* field requires a value.
K4	Missing record type	The *Record Type* field requires a value.
KI	Missing Item/SKU for Key Type IT.	You must enter an *Item* if the Key type is IT.
KT	Invalid key type for record.	The *Key Type* field is invalid. The key type must be *IT*. If you pass an invalid key type for an *01* Item/SKU record type, the system automatically corrects it.

Error Code	Error Message	Problem
SC	Multiple primary locations for this Item/SKU not allowed.	The SKU already had a primary location and the *Allow Multiple Primary Item Locations (D12)* system control value is set to *NOT ALLOW*.
SD	SKU Long SKU Style required.	The *Require L/S Style (I94)* system control value is *selected* and a *L/S Style* is not defined at the SKU level.
SE	SKU Long SKU Style is not unique.	The *Require L/S Style (I94)* system control value is *selected* and the *L/S Style* defined at the SKU level is also assigned to another item or SKU.
Q1	Error on Query	The current batch of 1000 RI Item Upload records failed to process because someone was creating or updating item/SKU information in Order Administration at the same time the RI Item Upload process was processing a record for the same item/SKU information. For example, you would get this error if someone was creating an item at the same time the RI Item Upload process was trying to create this same item. In this situation, the system updates the status of all of the records in the batch to *E* (Error) with the reason Error on Query.
Item errors		See *Fields for 01 Item/SKU record type*.
10	Invalid Long SKU Department.	The *Department (L/S department)* field contains an invalid value.
11	Long SKU Department required.	The *Department (L/S department)* field does not contain a value.
12	Long SKU Division required.	The *L/S Division* field does not contain a value. This field is required if the *Require Long SKU Division with Long SKU Department (E85)* system control value is *selected* and you are passing a new *Department (L/S department)* value.
13	Invalid Long SKU Division.	The *L/S Division* field contains an invalid value.
14	Invalid UOM Type for item.	The *UOM (Unit of Measure)* field for the item contains an invalid value.
15	UOM - Item Required.	The *UOM (Unit of Measure)* field for the item does not contain a value.
16	Invalid Vendor for Item.	The *Vendor #* field for the item contains an invalid value.
17	Invalid Ship Via for Item	The *Ship Via Code* field for the item contains an invalid value.
18	Invalid Manufacturing Vendor for Item.	The *Manufacturer Vendor* field for the item contains an invalid value.
19	Invalid Entity for Item.	The *Entity Number* field for the item contains an invalid value.
1D	Invalid Kit Type	The *Kit Type* field must be *S*, *F*, or *V*.
1G	Invalid Ship Alone flag.	The *Ship Alone* field must be *S* or blank.

Error Code	Error Message	Problem
1J	Item Description required.	The *Description (Item description)* field is blank and requires a value.
1N	Invalid buyer for item.	The *Buyer* field contains an invalid value.
1Q	Invalid Hazard Code	The *Code (Hazard code)* field contains an invalid value.
1R	Invalid Item Class for item.	The *Item Class* field contains an invalid value for the item.
1S	Item Class Required	The *Item Class* field does not contain a value.
1U	Invalid Item SKU Group code for item.	The *SKU Group* field contains an invalid value.
1V	Invalid Item Status for item.	The *STS (Status)* field for the item contains an invalid value.
1W	Invalid Location Class	The *Location Class* field contains an invalid value.
1Y	Invalid Long SKU Class for item.	The *Class (Long SKU class)* field contains an invalid value.
1Z	Item Long SKU Class required.	The *Class (Long SKU class)* field does not contain a value.
SKU errors		See *Fields for 01 Item/SKU record type*.
20	SKU Crt - SKU Exists	The SKU you are trying to create already exists.
21	Subscription must be defined as non-inventory.	The *Subscription* field must contain a *Y* or *N*.
22	Must enter hidden tax amount OR hidden tax percent.	You can enter a value in the *Hidden Tax Amount* field OR *Hidden Tax Percent* field, but not both.
24	Sort Sequence # required for SKU.	The *Collating Seq #* field must contain a value.
25	SKU not eligible for zone reservation code.	The *Zone Reservation* field must be blank for the SKU.
26	Coordinate Group (999) cannot be assigned to a Set/ Component item.	You cannot enter a value in the *Coord group (Coordinate group items?)* field for a set item.
2L	Invalid Warehouse code.	The *Whs (Warehouse)* field contains an invalid value.
2M	Warehouse is Required.	The *Whs (Warehouse)* field does not contain a value.
2N	Invalid Location code.	The *Location* field contains an invalid value.
2O	Invalid Sold Out Control code.	The *Soldout control code* field contains an invalid value.

Error Code	Error Message	Problem
2P	Invalid UOM Type for SKU	The *UOM Type* field for the SKU contains an invalid value.
2Q	Invalid Item Status for SKU	The *Status* field contains an invalid value for the SKU.
2R	Invalid category for SKU.	The *Category* field contains an invalid value for the SKU.
2T	Invalid Country of origin for SKU	The *Country of Origin* field contains an invalid value for the SKU.
2U	Invalid Long Sku Class for SKU.	The *L/S Class* field contains an invalid value for the SKU.
2V	Invalid Long SKU Class/Department combination for SKU.	The *L/S Class* and *Department (L/S department)* combination is invalid for the SKU.
2W	Invalid Zone Reservation for SKU.	The *Zone Reservation* field contains an invalid value.
2X	Invalid SKU Element 1	The *SKU* field contains an invalid value for SKU element 1.
2Y	Invalid SKU Element 2	The *SKU* field contains an invalid value for SKU element 2.
2Z	Invalid SKU Element 3	The *SKU* field contains an invalid value for SKU element 3.
Item Offer errors		See *Fields for 03 Item Offer record type*.
3A	Invalid Offer for Item	The *Offer for Item Offer* field contains an invalid value for the item.
3B	Offer is Required for item	The *Offer for Item Offer* field does not contain a value for the item.
3C	Item Offer Create - Item/Offer Exists	The *Offer for Item Offer* you are trying to create already exists.
3D	Invalid Item Offer	The *Offer for Item Offer* field contains an invalid value.
3H	Invalid Feature/ Option flag on Item Offer.	The *Feature/option* field contains an invalid value for the item offer.
3I	Invalid Pickup/New flag on Item Offer.	The *Pickup/new* field contains an invalid value for the item offer.
3M	Invalid Additional Charge code on item offer.	The *Add'l chg code* field contains an invalid value for the item offer.
3N	Invalid Add-On code on item offer.	The *Add-On Code* field contains an invalid value for the item offer.
3P	Spcl Hand price not allowed on item offer when not eligible.	The *S/H Price* field does not contain a value for the item offer.

Error Code	Error Message	Problem
3Q	Spcl Hand code not allowed on item offer when not eligible.	The *S/H Flag* field does not contain a value for the item offer.
3R	Invalid Coupon Expiration Date on Item Offer	The *Coupon Effective* field contains an invalid date. The date must be in CYYMMDD format.
SKU Offer errors		See *Fields for 04 SKU Offer record type*.
4A	Invalid Offer for SKU	The *Offer for SKU Offer* field contains an invalid value for the SKU.
4B	Offer is required for SKU.	The *Offer for SKU Offer* field does not contain a value for the SKU.
4C	SKU Offer Create - SKU/Offer Exists	You cannot create the *Offer for SKU Offer* because it already exists.
4D	Invalid SKU Offer	The *Offer for SKU Offer* you are trying to create is invalid.
4H	Invalid Feature/ Option flag on SKU Offer.	The *Feature/Option* field contains an invalid value for the SKU offer.
4I	Invalid Pickup/New flag on SKU Offer.	The *Pickup/New* field contains an invalid value for the SKU offer.
4M	Invalid Additional Charge code on SKU offer.	The additional charge code in the *Add'l chg* field is invalid for the SKU offer.
4N	Invalid Add-On code on SKU offer.	The add-on code in the *Add-On Code* field is invalid for the SKU offer.
4P	Spcl Hand price not allowed on SKU offer when not eligible.	The *S/H Price* field does not contain a value for the SKU offer.
4Q	Spcl Hand code not allowed on SKU offer when not eligible.	The *S/H Flag* field does not contain a value for the SKU offer.
4R	Invalid Coupon Expiration Date on SKU Offer	The *Coupon Effective* field contains an invalid date. The date must be in CYYMMDD format.
Item Price errors		See *Fields for 05 Item Price record type*.
5A	Invalid Offer for Item Price	The *Offer for Item Price* defined for the item price is invalid.
5B	Offer is required for item price.	The *Offer for Item Price* field does not contain a value for the item price.
5C	Effective date is required for item price.	The *Effective Date* field does not contain a value for the item price.

Error Code	Error Message	Problem
5D	Quantity is Required for Item Price	The *Qty* field does not contain a value for the item price.
5E	Itm Price Crt - Item Price Exists	You cannot create the item price because it already exists.
5F	Invalid item effective date or quantity.	The *Effective Date* or *Qty* is not valid for the item price record.
5G	Price required on item price.	The *Price* field does not contain a value for the item price.
5H	Invalid Effective Date on Item Price	The *Effective Date* field contains an invalid date. The date must be in CYYMMDD format.
5I	Price cannot be negative on item price.	The *Price* field contains a negative value for the item price.
5J	Invalid item offer for item price.	The item offer price is invalid.
SKU Price errors		See *Fields for 06 SKU Price record type*.
6A	Invalid Offer for SKU Price	The *Offer SKU Price* is invalid for the SKU price.
6B	Offer is required for SKU price.	The *Offer SKU Price* field does not contain a value for the SKU price.
6C	Effective date is required for SKU price.	The *Effective Date* field does not contain a value for the SKU price.
6D	Quantity is required for SKU price.	The *SKU Price Qty* field does not contain a value for the SKU price.
6E	SKU Price Crt - SKU Price Exists	You cannot create the SKU price because it already exists.
6F	Invalid sku effective date or quantity.	The *Effective Date* or *SKU Price Qty* is not valid for the SKU price record.
6G	Price required on Sku price.	The *Price* field does not contain a value for the SKU price.
6H	Invalid Effective Date on SKU Price	The *Effective Date* field contains an invalid date. The date must be in CYYMMDD format.
6I	Price cannot be negative on Sku price.	The *Price* field contains a negative value for the SKU price.
6J	Invalid sku offer for sku price.	The SKU offer is invalid for the SKU price.
Vendor Item errors		See *Fields for 07 Vendor Item record type*.

Error Code	Error Message	Problem
7A	Invalid Vendor for Vendor Item.	The *Vendor Number* field contains an invalid value for the vendor item.
7B	Vendor is required for vendor item.	The *Vendor Number* field does not contain a value for the vendor item.
7C	Vendor Item code is required for vendor item.	The *Item (Vendor item)* field does not contain a value for the vendor item.
7D	VIT Crt - VIT Exists	You cannot create the vendor item because it already exists.
7E	Invalid vendor item.	The *Item (Vendor item)* is invalid.
7F	Vendor Item Description required.	The *Description* field is required for vendor item.
7G	Invalid PO Ship Via code on Vendor Item.	The *Ship Via* field contains an invalid value for vendor item.
7H	Invalid UOM Type for Vendor Item.	The *UOM Type (SKU)* field contains an invalid value for vendor item.
7I	Invalid country of origin for Vendor Item.	The *Country of Origin* field contains an invalid value for vendor item.
Item UPC errors		See *Fields for 08 Item UPC record type*.
8A	UPC type is required for Item UPC.	The *UPC Type* field is required.
8B	UPC # is required for Item UPC.	The *UPC* field is required.
8C	UPC Crt - UPC exists	You cannot create the UPC because it already exists.
8D	Invalid Item UPC	The *UPC* for the item is invalid.
8E	Invalid Vendor on Item UPC.	The *UPC Vendor Nbr* defined for the *UPC* is invalid.
8F	UPC already assigned to xxxx. (where xxxx is item and sku)	The *UPC* is already assigned to another item/SKU.
8G	UPC Length is Invalid	The *UPC* length is invalid for the *UPC Type*. Not currently implemented.
8H	UPC type is invalid for Item UPC	The *UPC Type* is invalid.
Item Coordinate errors		See *Fields for 09 Item Coordinate record type*.
9A	Invalid Item Coordinate	The *Coordinate Item* specified does not exist.

Error Code	Error Message	Problem
9B	Invalid Item Coordinate Type.	The *ICN Coordinate Item Type* specified does not exist.
9C	Invalid Coordinate SKU.	A SKU is specified for a non-SKUed item, or the SKU specified for a SKUed item does not exist.
9D	Item Coordinate is required.	No *Coordinate Item* is specified.
9E	Can't add Item Coordinate because Item Coordinate already ex	The non-SKUed coordinate item specified for an Add request is already assigned to the item.
9F	Can't add Coordinate SKU. Coordinate SKU already exists.	The specified SKU of the coordinate item specified for an Add request is already assigned to the item.
9G	Coordinate SKU is required for SKU'ed item.	There is no coordinate SKU specified for the coordinate item, and it is a SKU'd item.

Creating and Maintaining Long SKU Divisions (WLDV)

Purpose: Use the Work with Long SKU Division menu option to create, change, delete or display long SKU division codes. Long SKU divisions are used in conjunction with long SKU departments and long SKU classes to establish a hierarchy within a company or entity, usually in a retail environment. For example, a company can have Men's, Women's and Children's divisions, with the same departments such as Apparel, Shoes, and Accessories, with different classes in those departments.

The *Require Long SKU Division with Long SKU Department (E85)* system control value determines whether you must specify a long SKU division with a long SKU department.

Uploading: Options to import long SKU divisions include:

- *Importing Enterprise Foundation Data through Omnichannel Cloud Data Service (OCDS)*
- *Importing Item-Related Supporting Data (SDUP)*

In this topic:

- *Work with Long SKU Division Screen*
- *Create Long SKU Division Screen*

Work with Long SKU Division Screen

How to display this screen: Enter *WLDV* in the Fast Path at the top of any menu or select Work with Long SKU Division from a menu.

Field	Description
Div (Division)	A code that represents a long SKU division. L/S divisions are used in conjunction with long SKU departments and long SKU classes for reporting purposes and to create a hierarchy within a company or entity. Long SKU division codes are defined in and validated against the L/S Division table. If the *Require Long SKU Division with Long SKU Department (E85)* system control value is *selected*, you must specify a long SKU division when you create, or maintain an existing, long SKU department, or in specific situations when you populate the *RI Item Upload Table (RIIUPP)*. See *L/S Division* for more information. Alphanumeric, 4 positions; optional.
Description	The description of the long SKU division. Alphanumeric, 30 positions; optional.

Screen Option	Procedure
Create a L/S Division	Select *Create* to advance to the *Create Long SKU Division Screen*.
Change L/S Division information	Select *Change* for a long SKU division to advance to the Change Long SKU Division Screen. At this screen, you can change just the Description. See the *Create Long SKU Division Screen* for field descriptions.
Delete a L/S Division	Select *Delete* for a long SKU division to delete it. Even if long SKU departments are linked to this L/S division, you can still delete the division code. The next time you maintain the L/S department value, you receive an error message that the L/S division does not exist. You must then select or create a valid L/S division code.
Display a L/S Division	Select *Display* for a long SKU division to advance to the Display Long SKU Division Screen. You cannot change any information at this screen. See the *Create Long SKU Division Screen* for field descriptions.
Print a L/S Division list	Select *Print List* for a long SKU division to print it.

Create Long SKU Division Screen

Purpose: Use this screen to create a long SKU division.

How to display this screen: Select *Create* at the *Work with Long SKU Division Screen*.

Field	Description
L/S Division	A code that represents a long SKU division. L/S divisions are used in conjunction with long SKU departments and long SKU classes for reporting purposes and to create a hierarchy within a company or entity. Long SKU division codes are defined in and validated against the L/S Division table. If the *Require Long SKU Division with Long SKU Department (E85)* system control value is *selected*, you must specify a long SKU division when you create, or maintain an existing, long SKU department, or in specific situations when you populate the *RI Item Upload Table (RIIUPP)*. See *L/S Division* for more information. Alphanumeric, 4 positions. Create screen: required. Change screen: display-only.
Description	The description of the long SKU division. Alphanumeric, 30 positions; required.

11

Order Entry

- Entering Orders
- Working with Error Order Batches
- Generic Order Interface
- Order Entry Appendices (Integrations with AvaTax, Vertex, and Experian Data Quality (EDQ))

Entering Orders

Topic in this part: The following topics describe how to enter individual orders on the system as you receive them:

- Introducing Order Entry describes the process of entering orders on the system from a high-level point of view.
- Setting Defaults in Order Entry describes how to pre-define codes for several Order Entry fields.
- Selecting Customers in Order Entry describes how to select a customer for Order Entry.
- Entering Orders describes how to enter a complete order.
- Working with Items on the Order describes how to change, review or enhance information for items you have added to the order.
- Upselling the Customer in Order Entry describes several features available in the system that offer the customer discounts, incentive items, or free gifts, based on a quantity, item, source code, or offer on the order.
- Expanding the Address in Order Entry describes how to enter or verify additional address information that does not appear on the initial Order Entry screen.
- Using a Permanent Shipping Address in Order Entry describes how to specify a shipping address for the order that will be linked permanently to the customer who placed the order and may be used on future orders.
- Assigning an Order Shipping Address describes how to specify a shipping address for the order that will be linked to the current order only.
- Adding a Recipient Order in Order Entry describes how to enter the address to which the recipient or gift order will be shipped.
- Assigning a Billing Address in Order Entry describes how to specify a billing address for an order.
- Defining Order Properties describes several fields that are not available on the initial Order Entry screen that allow you to further define the order.
- Adding Order Messages describes how to add messages to the order for inquiry only or that may be printed on the invoice and/or pick slip.
- Adding Miscellaneous Charges or Credits in Order Entry describes how to add miscellaneous charges or credits to the order.

- Displaying More Options in Order Entry describes how to use options related to Order Entry that are not available on the Order Entry screens, including: Customer Action Notes, Customer Profile, Customer Messages, Void/Reprint Picks, and Order Totals (All Recipients).
- Inquiring into Item Availability (DIAV) describes how to select an item for the order prior to Order Entry, how to capture lost sales, review the current on-hand availability, review the quantity on-order with your suppliers, review the next expected delivery, review the quantities available at a given location in a warehouse, review the pending purchase order deliveries, and review important item information.
- Entering User Fields describes the Enter User Fields screen that may open automatically during Order Entry to capture any type of additional information about the customer.
- Working with Order Summary Information describes the Order Summary screen, which contains all items on the order and any recipient orders.
- Posting a Return or Exchange Through Order Entry describes the process of using Order Entry to enter a return or exchange if you do not have the original order on your system.
- Entering Customer Memberships in Order Entry describes how to create a customer membership by adding a membership item in order entry.
- Entering Coupon Promotions on an Order describes how to apply coupon discounts against an order or detail line.
- Working with an Order-Level Email Address describes how the system stores an email address specific to each order.
- Valid Ship Vias for Window describes the window you use to review all eligible ship vias for the order, including their overall shipping charges and expected delivery dates. Optionally, you can use this window to select a different ship via for the order.
- Tracking Order/Call Disposition Activity describes when the system captures order/call disposition activity.
- Entering Pre-Order Quotes describes how to create a pre-order for a customer listing the items the customer wishes to order and the order totals should the customer agree to place the order.
- Customer Engagement Loyalty Integration describes how to enroll sold to customers in the Oracle Retail Customer Engagement Loyalty program, review a customer’s loyalty points and awards balances, accrue points from completed purchases, and redeem awards as a pro-rated merchandise discount on an order.
- Customer Engagement Customer Wish List Integration describes how to review and modify a customer’s wish list from Oracle Retail Customer Engagement using the Display Wish List Screen in Order Management System.

Enter/Maintain Orders (OEOM)

> **Note:**
>
> You can also enter orders in Modern View through the Order Entry option (CCOE).

For information on:	See:
The process of entering orders (**overview**)	Introducing Order Entry
Pre-defining **defaults** for your order entry session	Introducing Order Entry
Selecting a customer for an order	Selecting Customers in Order Entry
The **basic order entry process**, including entering customer information, items, and payment methods for order	Entering Orders
How to change, review, or enhance information for **items on an order**	Working with Items on the Order
Upselling the customer using features available to offer customer discounts, incentive items, or free gifts based on quantity, item, source code, or offer	Upselling the Customer in Order Entry
Entering or verifying **additional address information**	Expanding the Address in Order Entry
Entering a **shipping address that is linked permanently to the customer** and will be available for future orders	Using a Permanent Shipping Address in Order Entry
Entering a **temporary shipping address** to use for the current order only	Assigning an Order Shipping Address
Specifying a **different customer to receive the order**	Adding a Recipient Order in Order Entry
Specifying a **bill-to customer account** to associate with the customer	Assigning a Billing Address in Order Entry
Reviewing or changing **additional order properties**	Defining Order Properties
Entering **order messages**, either for inquiry purposes only or to print on the pick slip or invoice	Adding Order Messages
Add **miscellaneous charges or credits** to the order	Adding Miscellaneous Charges or Credits in Order Entry
Display **additional options**, such as customer action notes, customer profile, customer messages, void/reprint picks, and order totals across all recipients, related to the customer or order	Displaying More Options in Order Entry

For information on:	See:
Scanning for items prior to entering an order in order to determine an item's current availability and expected delivery from the vendor, and optionally pre-add the item to the order or track lost sales for items that are not available	Inquiring into Item Availability (DIAV)
Capture **additional information about customers**, as defined in your company	Entering User Fields
Using the **Order Summary screen**, which displays all items on the order, including any recipient orders	Working with Order Summary Information
Enter a **return or exchange** by entering a negative order quantity if you do not have the original order in the system	Posting a Return or Exchange Through Order Entry
Creating a **customer membership** by adding a membership item to an order	Entering Customer Memberships in Order Entry
Applying **coupon discounts** against an order or a particular order detail line	Entering Coupon Promotions on an Order
How the system stores an **email address** specific to an order	Working with an Order-Level Email Address
How order batches work (**overview**)	Introducing Order Batches
Working with an **order batch**	Working with an Order Batch
Working with individual orders within a batch	Performing Batch Order Entry
How to **release** the individual orders in a batch or how to **reject** the entire batch, if necessary	Accepting or Rejecting the Order Batch
A listing of the options available in order maintenance	Performing Order Maintenance

Work with Customer Call Log Screen (WCLL)

Purpose: Use this screen to review the call log entries that have been made for a customer or to make a new entry.

How to display this screen:

- Select Call Log at the Customer Selection Screen or the
- Enter WCLL in the *Fast path* field at the top of any menu, or select Work with CTI Customer Call Log from a menu

Field	Description
Customer	A number to identify the customer whose call log you are working with. If you advanced to this screen from the Customer Selection Screen and you were already reviewing information for a customer, this customer number and call log information defaults. To scan: You can enter the customer number in this field, or you can scan by clicking on the arrow. The Select Customer Sold To pop-up window opens. See the description of the Select Customer Sold To For Order Screen for complete field descriptions and instructions. *Numeric, 9 positions; required.*
Name	The customer's name, consisting of: **Prefix** A title (such as "Mrs." or "Dr.") that precedes the customer's name. *Alphanumeric, 3 positions; display-only.* **First Name** The Sold-to customer's first name. *Alphanumeric, 15 positions; display-only.* **Initial** The initial of the customer's middle name. *Alphanumeric, 1 position; display-only.* **Last Name** The customer's last name. *Alphanumeric, 25 positions; display-only.* **Suffix** An addition to the customer's full name (such as "M.D.," "Fr.," or "III"). *Alphanumeric, 3 positions, display-only.*
Company	The name of the company associated with the customer placing. *Alphanumeric, 30 positions; display-only.*
Street	The customer's street address. This is the primary delivery address. *Alphanumeric, 32 positions; display-only.*
Apt./suite	The apartment number or suite number associated with the customer's delivery address. *Alphanumeric, 10 positions; display-only.*
Postal code	The postal or zip code for this customer. *Alphanumeric, 10 positions; display-only.*
City	The city where the customer lives or receives mail or shipments. *Alphanumeric, 25 positions; display-only.*
St (State)	The state or province where the customer lives or receives mail or shipments. *Alphanumeric, 2 positions; display-only.*

Field	Description
Country	The code for the customer's country. Country codes are defined in and validated against the Country table. *Alphanumeric, 3 positions; display-only.*
Date	The date when the customer call log entry was made. *Numeric, 6 positions (in user date format); optional.*
Time	The time when the call log entry was made. *Numeric, 6 positions (HH:MM:SS format); display-only.*
In/out	Not currently implemented.
Operator	The operator who took or placed the call, or who created the entry. *Alphanumeric, 10 positions; display-only.*
Act (Activity)	Not currently implemented.
Comment (Unlabeled field below the other call log entry information)	The first line of up to three lines of comments or description entered. *Alphanumeric, 70 positions; display-only.*

Screen Option	Procedure
Enter a new call log entry	Select Create to advance to the Log Telephone Call Screen (Entering or Changing a Call).
Change a call log entry	Select Change for a log entry to advance to the Log Telephone Call Screen (Entering or Changing a Call).
Delete a call log entry	Select Delete for a log entry to delete it. The Delete Customer Call Log Records (A78) secured feature controls the ability to delete call log records.
Display a call log entry	Select Display for a log entry to advance to the Work with Customer Call Log Screen (WCLL). See Log Telephone Call Screen (Entering or Changing a Call) for field descriptions.
Place an outbound call	This option is not currently implemented.
Display additional customer information	Select Customer Inquiry to advance to the first Display Customer screen. See Creating and Updating Sold-to Customers (WCST).

Log Telephone Call Screen (Entering or Changing a Call)

Purpose: Use this screen to enter or change a CTI call log entry.

How to display this screen: Select Create at the Work with Customer Call Log Screen (WCLL).

> **Note:**
>
> You must first specify a customer number.

Field	Description
Customer	The number identifying the sold-to customer involved in the call. *Numeric, 9 positions; display-only.*
Company	The name of the company associated with the customer. *Alphanumeric, 30 positions; display-only.*
Name	The customer's name, consisting of: **Prefix** A title (such as "Mrs." or "Dr.") that precedes the customer's name. *Alphanumeric, 3 positions; display-only.* **First Name** The Sold-to customer's first name. *Alphanumeric, 15 positions; display-only.* **Initial** The initial of the customer's middle name. *Alphanumeric, 1 position; display-only.* **Last Name** The customer's last name. *Alphanumeric, 25 positions; display-only.* **Suffix** An addition to the customer's full name (such as "M.D.," "Fr.," or "III"). *Alphanumeric, 3 positions, display-only.*
Telephone	The telephone number involved in the call. *Numeric, 10 positions; optional.*
Call type	Not currently implemented.
Date	The date when the customer call log entry was made. *Numeric, 6 positions (in user date format); display-only.*
Time	The time when the call log entry was made. *Numeric, 6 positions (HH:MM:SS format); display-only.*
Operator	The operator who took or placed the call, or who created the entry. *Alphanumeric, 10 positions; display-only.*
Activity	A code representing the activity that triggered the call log entry. Valid values are: • **Call Connected** • **Call Busy** • **Call No Answer** • **other** *Blank = this is a system-created call log entry. The system creates call log entries automatically if the Update CTI Customer Call Log (F27) system control value is selected. This is not a valid value when you create or update a call log entry manually. *Required.*

Field	Description
Comments	Three lines for you to enter a comment on or description of the call. *Alphanumeric, 70 positions each; optional.*

Inquiring into Item Availability (DIAV)

Purpose: Use item availability to check:

- The quantity available to sell of an item
- The quantity on-order from your vendor
- The next expected delivery date for an item
- The soldout status of an item
- The quantity available for an item at a given location in the warehouse
- The pending purchase order deliveries
- pricing information for an item/SKU in a specific offer

You can also select this option if you need to:

- Capture a lost sale, if the customer decides not to order an item because it is not in stock. This enables you to track true demand for the item, and reevaluate the quantity of the item to purchase in the future.
- Select an item for an order in Order Entry using the “notepad” function. This tags the item for the next order you enter, allowing you to add the item to the order automatically.
- Inquire into availability in remote systems, such as store locations

How the system selects an offer to display and to use for posting lost sales: Any lost sales you enter in order entry (by selecting Lost Sale for the item and a lost sale quantity) post to the default Current Offer (A33) for your current company, indicated next to each item/SKU in item availability.

How the system selects an offer for pricing: See the Display Item/Offer Prices Screen for a description.

For more information:

- selecting cross-company scanning for your company: Working with Companies (WCMP)
- setting up offers: Working with Offers (WOFR)
- setting up item offers and SKU offers: Assigning Items/SKUs to Offers

In this topic:

- Display Item Availability Screen
  - Displaying Item Aliases
- Selecting Items Prior to Order Entry
  - Display Selected Items Window
- On Hand by Warehouse Screen (Reviewing Quantities On-hand by Warehouse)

- Display Item/Offer Prices Screen
- Capturing Lost Sales
- Display SKU Availability Screen

See also: Display SKUs Screen (Scanning Items by SKU Description) (DSKU)

Display Item Availability Screen

How to display this screen:

- Select Availability at the Select Customer Sold To For Order Screen or Item Availability at the Customer Selection Screen in Order Entry
- Enter DIAV in the *Fast Path* field at the top of any menu, or select Display Item Availability from a menu.

Restricted items, identified by a selected Restrict field in the SKU table, do not appear on the Item Availability screen.

This screen displays item availability only for items warehouses for which the Allocatable flag is selected.

When you first advance to this screen, items display in ascending item number, SKU code, warehouse code sequence.

Field	Description
Sts (Status)	A code displayed to the left of the item number that identifies the selling status code for your items, such as "discontinued." These codes can be used for sorting inventory reports. Item status codes are defined in and validated against the Item Status table. A status code is assigned to an item in the Status field in the Item table. See Working with Item Status (WIST) for background. *Alphanumeric, 1 position; display-only.*
Item	The code for an item that you sell. Item numbers are defined in and validated against the Item table. This is the base item number; the SKU code, if any, will be suffixed to the item number to accurately identify the item. An item alias may display instead of the actual item code. See Displaying Item Aliases. Enter a full or partial item code, *or* a valid alias code to display items in alphanumeric order beginning with your entry. See Displaying Item Aliases on scanning if you are using aliases. *Alphanumeric, 12 positions; optional.*
SKU	The specific style of the item, such as its color, size, or style. Enter a valid item code and full or partial SKU code to display items in alphanumeric order beginning with your entry. See Displaying Item Aliases on scanning if you are using aliases. *Alphanumeric, three 4-position fields; display- only.*

Field	Description
Whs (Warehouse)	The code for the warehouse where the item is stored. Warehouse codes are defined in and validated against the Warehouse table. Enter a valid warehouse code to display items in ascending numeric warehouse order beginning with your entry. See Creating and Maintaining Warehouses (WWHS). *Numeric, 3 positions; optional.*
Available (Quantity available)	The quantity of the item that is available to sell in this warehouse. The system uses this calculation to determine availability for a single warehouse in the Item Warehouse table: `On hand quantity - Protected quantity - Reserved quantity - Reserve Transfer quantity - Backordered quantity = Quantity available` When this field is blank or negative, the item is unavailable or on backorder. *Numeric, 7 positions; display-only, updated by the system.*
On order (Quantity on-order)	The total item quantity you expect to receive on purchase orders. If you receive purchase orders into suspense, the amount of stock received will remain in this field until the suspended stock is placed through Suspense placement. From *On order qty* in the Item Warehouse table. *Numeric, 7 positions; display-only, updated by the system.*
Ord qty (Order quantity)	The number of units of this item that the customer wants to order. See Selecting Items Prior to Order Entry for instructions. *Numeric, 5 positions; optional.*
Next Expected P/O Date	The date that you expect to receive this item from your vendor; this is the date from the PO Layering table. **Note:** If no entry exists in the PO Layering table or if the PO Layering record has a quantity of zero, then a next expected Po date does not display. Drop ships: This date is included for drop ship items only if the Assign Drop Ship Expected Ship Date (I59) system control value is selected. See that system control value for more information. *Numeric, 6 positions (in user date format); display-only.*
Next Expected Qty	The number of units of this item ordered on a purchase order that will be available for new orders. *Numeric, 7 positions; display-only.*
Item Description unlabeled field below Item number	A description of the item. *Alphanumeric, 120 positions; display-only.*

Field	Description
Item Number unlabeled field next to item description	The item number for the item alias that displays in the *Item* field. This field displays only if the Display Item Alias (D56) system control value is selected; see Displaying Item Aliases. *Alphanumeric, 12 positions; display-only.*
SKU Description unlabeled field next to item description	A description of the SKU. This field displays only if the Display Item Alias (D56) system control value is unselected and the item contains SKUs. *Alphanumeric, 40 positions; display-only.*
S/O (Soldout control code)	This code defines which calculation the system uses for item soldout processing. For example, you can: • define a soldout control code for items which will be flagged as soldout when available quantity is less than or equal to zero, including open purchase orders and projected returns • define a soldout control code for items which will be flagged as soldout when available quantity is less than or equal to zero, excluding open purchase orders and projected returns • define a soldout control code for items that must be flagged as soldout immediately See Working with Soldout Controls (WSLD). You assign these codes in the SKU table, or, if the item does not have SKUs, at the second item entry screen. If a soldout code has not been assigned to the item or SKU, this field will not display on the Display Item Availability screen. *Alphanumeric, 2 positions; display-only.*

Screen Option	Procedure
Select an in-stock item for the order	If you are using this screen within Order Entry, enter the number of units of the item the customer wants to order in the *Ord qty* field and select OK. See Selecting Items Prior to Order Entry.
Check warehouse locations for the item to see the quantity available to sell	Select Locations for an item to display the On Hand by Warehouse Screen (Reviewing Quantities On-hand by Warehouse).
Review pricing for the item, based on special pricing set up for the item in an offer	Select Pricing for an item to advance to the Display Item/Offer Prices Screen.
Review expected deliveries for the item	Select Open POs for an item to display the Display Open Purchase Orders Screen.
Log a lost sale for an out-of-stock item	Select Lost Sale for an item. Enter the quantity that the customer would have ordered in the *Ord qty* field and select OK. See Capturing Lost Sales.

<table>
<tr><th>Screen Option</th><th>Procedure</th></tr>
<tr><td>Search for the item across warehouses and stores in external systems</td><td>Select Merchandise Locator for an item to advance to the Merchandise Locator Search Window (Searching for an Item).

You cannot perform a merchandise locator search for an item/SKU if:
• the Use Merchandise Locator (I38) system control value is unselected. Otherwise, the system displays an error message: <code>Merchandise Locator is not enabled.</code>
• you have already entered an Ord qty to add to the order.
• the item is:
– soldout, canceled or closed
– included on a printed pick slip (however, if the pick slips have been voided, you can use the merchandise locator option)
– a component of a set
– a membership item
– a subscription item
– not flagged as OROB eligible
See Merchandise Locator API.</td></tr>
<tr><td>Create a tickler for the MN (manually created) tickler event</td><td>Select Create Tickler to advance to the Create Tickler Screen.

Note:
To create a MN tickler, you must have authority to the Create Manual Tickler (B13) secured feature.</td></tr>
<tr><td>Scan for an item or SKU by SKU description</td><td>Select Display SKUs to advance to the Display SKUs Screen (Scanning Items by SKU Description) (DSKU).</td></tr>
<tr><td>Display items selected for the order</td><td>If you are using this screen within Order Entry, select Selected Items to display the Display Selected Items Window to verify, add, or delete items for the order.</td></tr>
<tr><td>Display SKU availability</td><td>Select SKU Availability to advance to the Display SKU Availability Screen.</td></tr>
</table>

Displaying Item Aliases

If the Display Item Alias (D56) system control value is selected, the Display Item Availability Screen displays each item by its alias, if an alias is defined for the item in the selected offer. An alias is an alternative name you use to present an item to your customers; you might use aliases to track how presentation within an offer affects demand. The system uses these guidelines when displaying item alias information:

Actual item code display: Whenever an alias exists for the Current Offer (A33), the alias is indicated in the *Item* column. The actual item code is beneath the *Warehouse*. If an alias does not exist for the current offer, the actual item number displays in the *Item* column and beneath the *Warehouse*.

Positioning: Whether you enter an actual item code, a partial item code, or an alias in the *Item* field, the system always displays items positioned alphanumerically *by the actual item code.* You can scan by entering:

- a full or partial item code. The system displays the alias for the selected offer if it exists, but still positions alphanumerically by the actual item code.
- a valid alias code. The system displays the alias positioned alphanumerically *by the actual item code*. For example, the actual item code is BU001, while the item alias is RAB234. The system displays items positioned alphanumerically to BU001, while the item alias of RAB234 is indicated.

Most current offer: If the alias you enter is not associated with the most current offer as selected by the system, the system will still position alphanumerically to the correct item, although the alias associated with the most current offer will actually display. For example, if item AB100 has an alias of SPRING100 in your current offer but you search for it by entering WINTER100, the alias from a previous offer, the system positions to the correct item, but displays the spring alias for the item. Lost sales will post to the most current offer selected by the system.

If you enter an invalid alias code, the system displays items and/or aliases positioned alphanumerically by actual item code. In the example, if you entered RAB345 (an invalid alias code) in the *Item* field, the system would display item and/or aliases whose actual item codes begin with “R.”

Selecting Items Prior to Order Entry

Purpose: Use this option to tag items for the new order directly from the Display Item Availability Screen and Display SKU Availability Screen. These are items that the customer wanted to verify are in-stock, and now wants to order.

You can use this option to add items to an order only if you are viewing this screen within Order Entry. The system does not save this information if you selected the Display Item Availability function from a menu.

Instructions:

1. Use the Display Item Availability Screen or Display SKU Availability Screen to locate the desired item/SKU.
2. Enter the number of units the customer wants to order in the *Ord qty* field on the right side of the screen. **Note:** The Display Item Availability screen displays an *Ord qty* field for each allocatable item warehouse defined for an item; however, when you enter the number of units the customer wishes to order, the system does not hold this quantity against any specific warehouse and determines the warehouse to reserve against when you add the item to the order.
3. Select OK.
4. Repeat Steps 1-4 for each item/SKU the customer wants to order.
5. Optionally, select Selected Items to display the items/SKUs you have selected. The Display Selected Items Window opens. Here, you can verify, add, or remove items from the notepad.
6. Select Exit when you finish ordering items. You return to the Select Customer Sold To For Order Screen.
7. Begin entering an order.
8. Complete the Order Entry screen as needed.
9. Select OK. The Display Selected Items Window opens automatically.
10. Select OK to add these items to the order, select Delete for the items the customer doesn't want, or select Remove Lines to remove all items from the order.

> **Note:**
>
> - The Work with Item/SKU Comments Window opens if there are any comments associated with the selected item or SKU, provided the comments have the *Print code* set to Window.
> - If there are multiple entries for an item/SKU with different warehouses and you select a warehouse other than the default, the item/SKU is still assigned to the default warehouse when you add it to the order. Optionally, you can use the Work with Order Line Screen (Changing/ Adding an Item) in order entry or maintenance to select a different warehouse.

Display Selected Items Window

Purpose: Use this option to verify which items have been tagged to add to the order, or to delete items from the notepad.

How to display this window: Select Selected Items at the Display Item Availability Screen or Display SKU Availability Screen. You can also display this window by exiting these screens and then re-entering without clearing the selected item notepad, or by selecting a customer for order entry.

> **Note:**
>
> This window also displays any items that you selected for purchase from the Display Wish List Screen; see Selecting a Wish List Item for Purchase.

Field	Description
Item	The code for the item the customer wants to order. *Alphanumeric, 12 positions; display-only.*
SKU	The style associated with the item, such as its color, size, and style. *Alphanumeric, three 4-position fields; display-only.*
Qty (Quantity)	The quantity of the item the customer wants to order. *Numeric, 5 positions; display-only.*
Description (Unlabeled field below the item)	The description of the item. *Alphanumeric, 120 positions; display-only.*

Screen Option	Procedure
Remove an item from the notepad, if the customer changes his or her mind	Select Delete for the item.
Add all items displayed in the window to the order	Select OK. The system adds all items to the order.

Screen Option	Procedure
Remove all items from the notepad, if the customer no longer wants any of these items	Select Delete All, then select OK at the delete- confirmation prompt.

On Hand by Warehouse Screen (Reviewing Quantities On-hand by Warehouse)

Purpose: Use this option to determine where an item is available in the warehouse and how many units of the item are stored in each location. This is useful, for example, if the item is out of stock in a location, but readily available in another. It may indicate that you have to transfer the item to a different location so it can be reserved on a new order.

How to display this screen: Select Locations for an item listed on the Display Item Availability Screen.

Field	Description
Warehouse	The code for the warehouse where the item is available. Warehouse codes are defined in and validated against the Warehouse table. *Numeric, 3 positions; display-only.*
Item	The code for a unit of inventory that you sell. Item codes are defined and validated against the Item table. *Alphanumeric, 12 positions; display-only.*
SKU	The code for the style of the item, such as its color or size. SKU codes are defined in and validated against the SKU table. *Alphanumeric, three 4-position fields; display-only.*
Location	The code for the area in the warehouse where the item is stored. Location codes are defined in and validated against the Location table. Items are assigned to a location in the Item/Warehouse/ Location table. *Alphanumeric, 7 positions; display-only.*
Typ (Type)	A code that defines the type of warehouse location where the item is stored. Valid values are: P = Primary: the main location where you pick an item. S = Secondary: An additional location used for picking or replenishment. B = Bulk: an overstock area in the warehouse to store the item in case lots or cartons that you do not break up at Purchase Order Receiving. Bulk locations are used only to replenish primary and secondary locations for an item. T = Temporary: a location created only so that you can recognize an item as "received" before you assign a permanent location. The system deletes temporary locations when the quantity reaches zero. You must define a location as "pickable" for the system to print a pick slip for the location. *Alphanumeric, 1 position; display-only.*
On hand	The quantity of the item in this location that is available to sell. *Numeric, 7 positions; display-only.*

Field	Description
Printed	The number of units of this item that have been allocated in this location (picks slips have been printed). *Numeric, 7 positions; display-only.*

Display Item/Offer Prices Screen

Purpose: Use this screen to review pricing information for a specific item or SKU in an offer such as:

- pricing information for all active offers associated with the item/SKU
- the currency code for the offer
- special quantity price breaks
- the gross profit margin percentage defined for a specific price

How the system selects an offer for pricing: The pricing information displayed for the item is based on:

1. The current offer: A current offer is one whose date range includes today's date. In order for the system to check a current offer for an item or SKU in item availability, there must be at least one item offer or SKU offer that has a price, and which is currently effective based on the *Effective date*.

   If there is more than one current offer for the item or SKU, check the current offer with the most recent start date. (If the two most current offers have the same start date, select the first offer alphanumerically.) Then select

   - the most recent SKU offer based on *Effective date*. If there is not a valid SKU offer, or if the item does not have SKUs, use:
   - the most recent item offer based on *Effective date*.
2. An inactive offer: An inactive offer is one whose date range has ended. If there is not a qualifying active offer for the item or SKU, then select
   - the most recent inactive offer based on start date (if two inactive offers have the same start date, select the first one alphanumerically). Then select
     - the most recent SKU offer based on *Effective date*. If there is not a SKU offer, or if the item does not have SKUs, use:
     - the most recent item offer based on *Effective date*.
3. A future offer: A future offer is one whose start date has not yet occurred. If there is not a qualifying active or inactive offer for the item or SKU, then select the soonest future offer based on start date. If there is more than one future offer with the same start date, select the last one alphanumerically.
4. The default current offer: If there is not a qualifying active, inactive, or future offer for the item or SKU, then use the default Current Offer (A33) from the System Control table.

How to display this screen: Select Pricing for an item or SKU, for which you wish to review pricing information, on the Display Item Availability Screen. A different screen opens, depending on whether you are reviewing pricing information for an item or SKU.

Field	Description
Item	The item and description for which you are reviewing pricing information. If you are reviewing SKU pricing information, the SKU code is presented in this field. *Item code: Alphanumeric, 12 positions; display-only.* *Item description: Alphanumeric, 120 positions; display-only.*
Curr code (Currency code)	A code that defines the currency for orders you process for this offer. **Note:** Included only if the Multi Currency by Offer (E03) field in the System Control table is selected. When you enter a source code associated with this offer in Order Entry, the system will search for a price only among offers that share this currency. Additionally, you cannot override the offer on an order detail line to one with a different currency. The currency used on an order is indicated by the bank code on various screens and reports, such as those having to do with refunds. This is because each currency must be associated with at least one unique bank. When you create a source code, you must specify a division which links to a bank code that is consistent with the currency of the offer. The currency code is defined in and validated against the Currency table. See Working with Currency (WCUR). *Alphanumeric, 3 positions; display-only.*
Offer code	A code representing the catalog whose prices you are reviewing. Offers are defined in and validated against the Offer table. Use the Item/SKU Offer table to identify which items/SKUs are carried in the offer. Also, use the Item/SKU Prices table to define price breaks for the item/SKU in the offer. *Alphanumeric, 3 positions; optional.*
Qty (Quantity)	The quantity of the item/SKU that must be purchased to receive the price break. Any SKU ordered for this item is counted towards this quantity. This number is from the *Qty* field in the Item Prices table. If the quantity is 1, you are offering your customers an automatic discount if they purchase this item. If the quantity is greater than 1, your customers must purchase several units of the item (such as in different colors) to receive the price break. Customers assigned to the pricing column defined here receive the quantity break price automatically regardless of the quantity ordered. *Numeric, 7 positions; display-only.*
Price	The selling price of the item for your regular customers who order the required quantity of the item or who belong to the appropriate pricing column. *Numeric, 13 positions with a 2-place decimal; display-only.*

Field	Description
Tax incl (Tax-inclusive price)	The price at which the item will be sold on orders subject to tax-inclusive pricing and VAT. Included only if the Tax Included in Price (E70) system control value is selected. *Numeric, 13 positions with a 2-place decimal; display-only.*
Gross margin %	The percentage of the item's price that exceeds the cost of the item. You can use gross margin to determine the profit of an item on the order based on the item's selling price. See Determining Gross Profit for a discussion. The Display Gross Margin (A65) secured feature controls whether this field is included in order entry, maintenance, inquiry and item availability. *Numeric, 5 positions with a 2-place decimal; display-only.*
Assoc price (Associate price)	The selling price of the item for your associate customers (*Associate* = Selected in the Customer table) who order the required quantity of the item or who belong to the appropriate pricing column. Items eligible for the price break are repriced automatically and the system updates the pricing method field with *Quantity Break Price. *Numeric, 13 positions with a 2-place decimal; required, calculated by the system.*
Tax incl (Tax-inclusive associate price)	The price at which the item will be sold to associate customers on orders subject to tax-inclusive pricing and VAT. Included only if the Tax Included in Price (E70) system control value is selected. *Numeric, 13 positions with a 2-place decimal; display-only.*
Column (Column number)	The pricing column eligible for this price break. Customers belonging to this pricing column receive the quantity price break automatically, regardless of the quantity ordered. *Numeric, 2 positions; display-only.*

Capturing Lost Sales

Purpose: Use this option to flag a lost sale for an item that the customer would have ordered if the item was available. This option helps you capture true demand for an item. This figure is important so you can order enough stock for the item in the future to meet demand.

Why lose sales? You may lose a sale if the customer inquires about the availability of an item before placing an order. If the item is backordered, the customer may decide not to place an order at this time. Because of this, you lost a potential sale.

Recording the lost sale: The dollar value and the number of lost sales are captured in the *Units lost CTD* field in the SKU/Offer/Page record.

When you enter lost sales, the system assigns them to the offer currently displaying on the Display Item Availability Screen. Additionally, the system posts the lost sales to page number 99999 in the default Current Offer (A33) for your current company.

Instructions: At the Display Item Availability Screen:

1. Locate the item that the customer wanted to order.
2. Select Lost Sale for the item.

3. Enter the quantity of the item that the customer would have purchased in the *Ord qty* field on the right side of the screen.
4. Select OK. The system calculates the dollar amount and number of units in lost sales for the item.
5. Repeat these steps for each item you want to identify as a lost sale.

Display SKU Availability Screen

Purpose: Use this screen to see the availability of each SKU of a specified item. From this screen you can also:

- If you are in order entry, enter the quantity of the SKU you wish to add to the next customer's order.
- review the next expected purchase order date and quantity for the SKU.
- review additional information about the item.
- review open purchase orders for the item.

Restricted SKUs, identified by a selected *Restrict* field in the SKU table, do not appear on the Display SKU Availability screen.

This screen displays SKU availability across item warehouses for which the Allocatable flag is selected.

How to display this screen: Select SKU Availability at the Display Item Availability Screen.

When you first advance to this screen, you must enter an item in the *Item* field to display SKU availability for the item. SKU availability for the specified item displays in ascending SKU code sequence.

Field	Description
Item	Enter a valid item number and select OK to see availability for each SKU of the item. You can also prompt on this field to advance to the Item Selection screen where you can search and select an item. Item numbers are defined in and validated against the Item table. The message `Item does not have SKUs` displays if the item is a non-SKUed item. *Alphanumeric, 12 positions; required to review SKU availability.*
Item description unlabeled field below Item	A description of the item specified in the *Item* field. *Alphanumeric, 120 positions; display-only.*
SKU	The specific style of the item, such as its color, size, or style. The column headings are based on the values defined in the Split SKU Element Column Headings (A52, A53, A54) system control values. Enter a full or partial SKU element 1 to display SKUs in ascending alphanumeric order beginning with your entry. Enter a valid SKU element 2 or 3 to display SKUs that match your entry. *Alphanumeric, three 4-position fields; optional.*
Description	A description of the SKU. *Alphanumeric, 25 positions; display-only.*

Field	Description
Sts (Status)	The status code assigned to the SKU. Enter a valid SKU status code and select OK to display SKUs whose status matches your entry. *Alphanumeric, 1 position; optional.*
Available (Quantity available)	The quantity of the item that is available to sell across all shippable warehouses. The system sums the calculated quantity available across all allocatable item warehouses: `On hand quantity - Protected quantity - Reserved quantity - Reserve Transfer quantity - Backordered quantity = Quantity available` A negative quantity indicates that the SKU is unavailable in your inventory and is backordered. *Numeric, 7 positions; display-only, updated by the system.*
On order (Quantity on-order)	The total item quantity you expect to receive on purchase orders. If you receive purchase orders into suspense, the amount of stock received will remain in this field until the suspended stock is placed through Suspense placement. *Numeric, 7 positions; display-only, updated by the system.*
Ord qty (Order quantity)	The number of units of this SKU that the customer wants to order. See Selecting Items Prior to Order Entry. *Numeric, 5 positions; optional.*
Next Expected P/O Date	The date that you expect to receive this item from your vendor; this is the date from the PO Layering table. If no entry exists in the PO Layering table or if the PO Layering record has a quantity of zero, then a next expected Po date does not display. *Numeric, 6 positions (in user date format); display-only.*
Next Expected Qty	The number of units of the SKU ordered on a purchase order that will be available for new orders. If more than one allocatable item warehouse exists for the SKU, this information is based on the first item warehouse record found for the SKU. *Numeric, 7 positions; display-only.*

Screen Option	Procedure
Select an in-stock SKU for the order	If you are using this screen within Order Entry, enter the number of units of the SKU the customer wants to order in the *Ord qty* field and select OK. See Selecting Items Prior to Order Entry.
Review expected deliveries for the item	Select Open POs for a SKU to display the Display Open Purchase Orders Screen.
Display items selected for the order	If you are using this screen within Order Entry, select Selected Items to display the Display Selected Items Window to verify, add, or delete items for the order.

Display SKUs Screen (Scanning Items by SKU Description) (DSKU)

Purpose: Use this screen to locate a particular item or SKU based on a SKU description. You can then select the item or SKU to be displayed on the Display Item Availability screen.

How to display this screen: Select Display SKUs at the Display Item Availability Screen. You can also advance to this screen by selecting the Display SKU Screen menu option (*Fast path*= DSKU). If you use this method you will not be able to select a SKU from the SKU list.

Field	Description
Item	The code for an item that you sell. *Alphanumeric, 12 positions; optional.*
SKU	The specific style of the item, such as its color, size, or style. *Alphanumeric, three 4-position fields; display- only.*
SKU description	The description of a SKU. *Alphanumeric, 40 positions; optional.*
Available qty (Quantity available)	The quantity of the item that is available to sell. When this field is blank or this value is followed by a negative sign, the item is unavailable or on backorder. *Numeric, 7 positions; display-only, updated by the system.*

Screen Option	Procedure
Select an item or SKU to display on the Display Item Availability screen	Select an item or SKU to return to the Display Item Availability Screen. Select OK again to position the selected item/SKU at the beginning of the Item/SKU list.

Working with Error Order Batches

Topics in this part:

- Introducing Order Batches describes the process of working with batched orders from a high-level point of view.
- Working with an Order Batch describes how to review, correct, and accept orders received from an external system that are in error.
- Performing Batch Order Entry describes how to work with the individual orders in the batch.
- Accepting or Rejecting the Order Batch describes how to release the individual orders in a batch on the system once the batch is in balance or how to reject the entire batch, if necessary.

Printing the Retail Order Cross Reference Report (POCR)

Purpose: Use this menu option to print the Retail Order Cross Reference Report. This report displays the contents of the Order Cross Reference table.

You can use an external order number to associate an order with an order database existing outside of Order Administration. For example, you might take orders at your retail outlets, authorize a third party to take orders for you, or provide order entry service for someone else. You can process these orders through a variety of channels, such as from the web storefront or in retail locations.

In this topic:

- Retail Order Cross Reference Report

12
System Operations

Operating Background Jobs

Topics in this part: The following topics describe the functions available to operate the background ASYNC jobs.

- Using the ASYNC Jobs (MBJC) describes the purpose of the background jobs, provides a brief overview of the each background ASYNC job, explains the steps to use to start and end the background ASYNC jobs, and shows you how to location the function.
- Working with the CNTL_ASYNC Job shows you how to start and end the background ASYNC jobs, how to reorganize the data queues associated with the background ASYNC jobs, and how to change the status of the background ASYNC jobs.
- Working with the BILL_ASYNC Job shows you how to display the Billing Header Data Queue, how to correct Billing ASYNC errors, how to change the status of the Billing ASYNC job, and describes the table updates that occur when records are processed by the BILL_ASYNC job.
- Working with the EBO_ASYNC Job shows you how to display the Evaluate B/O Data Queue, how to correct EBO_ASYNC errors, how to change the status of the EBO_ASYNC job, and describes the table updates that occur when records are processed by the EBO_ASYNC job.

- Working with the ORDR_ASYNC Job shows you how to display the Order Ship To Data Queue, how to correct ORDR_ASYNC errors, how to change the status of the ORDR_ASYNC job, and describes the table updates that occur when records are processed by the ORDR_ASYNC job.
- Working with the OTHR_ASYNC Job shows you how to display the PO Header Data Queue, how to correct OTHR_ASYNC errors, how to change the status of the OTHR_ASYNC job, and describes the table updates that occur when records are processed by the OTHR_ASYNC job.
- Purging Active Procedures (MACP)shows you how to display the Active Procedures for a user and how to delete stranded Active Procedure records for a user.
- Working with Integration Layer Processes (IJCT) shows you how to work with the integration layer processes used for transmitting data between Order Management System and an external system.

Background Job Control (MBJC)

For information on:	See:
how to use the ASYNC (asynchronous) jobs, which process updates to tables related to transaction activity	Using the ASYNC Jobs (MBJC)
working with the **CNTRL_ASYNC** job reorganizing the queues	Working with the CNTL_ASYNC Job
the **BILL_ASYNC** job, which processes updates related to shipments and returns	Working with the BILL_ASYNC Job
the **EBO_ASYNC** job, which processes updates related to changes in backordered items	Working with the EBO_ASYNC Job
the **ORDR_ASYNC** job, which processes updates related to order entry and maintenance	Working with the ORDR_ASYNC Job
the **OTHR_ASYNC** job, which processes updates related to purchase order activity	Working with the OTHR_ASYNC Job

Purging Active Procedures (MACP)

Purpose: Use the Purge Active Procedures function to delete a user procedure that remains in an active status when the user is no longer in the application.

For example, if a terminal crashes when an operator is entering orders, the Active Procedures record for the user may not be deleted from the table. If a record exists in the Active Procedures table, the system thinks that the person is still using the application because the function was not exited properly.

If there are stranded Active Procedures records for any of the following functions, they must be deleted, otherwise the background ASYNC jobs cannot be ended:

- Order Entry/Maintenance
- Purchase Order Maintenance
- Receiving
- Confirmation
- PC Manifest or the *Generic Pick In API (Shipments, Voids, and Backorders)*

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

When the ASYNC jobs are ended, the system checks the Active Procedures table to see if there are any active records for these applications. A pop-up window indicates the User ID and application that is still active. You should ask that the user exit the application. If the user is not in the application, delete the record from the Active Procedures table.

> **Note:**
>
> This function should not be used to delete Active Procedures records for users who are still using an application. If you delete Active Procedures records while a user is still in the application, the user job will not be ended; that user can still enter transactions in the application, but transaction records cannot be sent to the data queues for processing because the data queues are reorganized when the ASYNC jobs end. No back end table updates for that user's transactions will be posted, which will cause your data tables to be out of sync.

Scheduling the active procedure purge: You can schedule the active procedure purge for the functions listed above using the PFR0121 Delete Stranded Active Procedures periodic function. The system deletes all active procedures for interactive jobs that are older than the number of hours defined in the periodic function's Parameter field. If the Parameter field is blank, the default number of hours is 24.

Interrupting confirmation email generation: You can delete the active procedure related to generation of shipment and return confirmations (Type = SC) in order to interrupt the generation process. The system keeps track of the last email generated so that you can restart the generation process at a later time. See Stopping and Restarting Shipment and Return Confirmation Emails for an overview.

To see active procedures for all users in your environment: Use the Purge Active Procedures Across Users (MACX) menu option to display active procedures for all users and to purge selected procedures as needed.

In this topic:

- Purge Active Procedures Screen (Selecting the User to Purge)
- Purge User's Active Procedures (Deleting an Active Procedure)

For more information: See Purge Active Procedures Across Users (MACX).

Purge Active Procedures Screen (Selecting the User to Purge)

Purpose: Use this screen to enter the User ID of the person whose record must be deleted from the Active Procedures table.

How to display this screen: Enter the Active Procedures Purge fast path name, MACP in the Fast path field at the top of any menu.

Field	Description
User	The User ID of the person whose active procedure is being deleted. The User ID is validated against the User Profile table. Alphanumeric, 10 positions; required.

Purge User's Active Procedures (Deleting an Active Procedure)

Purpose: This screen displays the system procedures that are currently active for the selected user.

> **Note:**
>
> **Important**: Be sure that the user has exited the application before you delete an Active Procedures record. When you a delete a record, the system no longer recognizes that the user is in the application. If the user is still active in the application, the user job will not be ended when the record is deleted.

How to display this screen: Enter a valid User ID at the Purge Active Procedures Screen (Selecting the User to Purge).

Screen Option	Procedure
Delete an active procedure	Select Delete for the active procedure you want to delete.

Purge Active Procedures Across Users (MACX)

Purpose: Use this option to display active procedures for all users in your environment and to purge active procedures as necessary if, for example, the job failed to end normally.

JOBCLN: The JOBCLN periodic function deletes each active procedure record for a job that is in END status, or that is not actually active . See Using the JOBCLN Function to Resolve Job Status Across Servers for a discussion.

Deleting an active procedure: Select an active procedure and click Delete to delete it.

Note:

- You cannot delete an active procedure that is actually running on a server. Only active procedure records that are unrelated to active jobs are eligible for deletion.
- When you delete an active procedure at this screen, it creates a User Audit record; however, no User Audit record is created if you attempt to delete an active procedure and the deletion does not succeed. See Tracking User, Authority, and Password Updates for more information on the User Audit table.

Purge Active Procedures Screen

How to display this screen: Enter MACX in the Fast path field at the top of any menu, or select Purge Procedures Across Users from a menu.

Field	Description
User	The user ID of the person who started the active procedure. For the BILLUSR job, set to the ID of the default user. Alphanumeric, 10 positions; display-only.
Workstation	If the active procedure is a: • background job: indicates the data queue (for example, BILLDATAQ indicates that this is the billing async job) • an IJCT process: indicates the process ID, such as BROKER Alphanumeric, 10 positions; display-only.
Job #	A job number assigned to uniquely identify the active procedure. Numeric, 6 positions; display-only.
Cmp (company)	The number identifying the company where the active procedure was started. Set to zero for active procedures that are not restricted by company, such as the background jobs; however, set to 999 for certain jobs, including the PICK_OUT process, the BROKER process, and the BROKER_ORD process. See Working with Companies (WCMP) for more information on companies. Numeric, 3 positions; display-only.
Type	The type of active procedure. Possible types are described below under Active Procedure Types. Filtering based on the Type is supported only for Data Queue and Reorganize. Display-only.
Program	The name of the program that is active. **Note:** A program of PFR0100 is displayed for the BILLUPD periodic function runs, although that function uses a Class name rather than a Program name. Alphanumeric, 10 positions; display-only.
Date	The date when the user started the procedure. Numeric, 6 positions; display-only.
Time	The time when the user started the procedure. Numeric, 6 positions; display-only.

Active Procedure Types

Some of the active procedure types displayed at this screen are described below.

Type	Description	Started When?
Data Queue	data queue	You create orders through Enter/Maintain Orders (OEOM); maintain purchase orders through Maintaining Purchase Orders (MPOE), receive purchase orders through Receiving Purchase Orders (PORC), and confirm shipments through Manually Confirming Shipments (MCON)
BA	billing async	The BILL_ASYNC job starts. See Working with the BILL_ASYNC Job for more information.
BB	batch billing update	The SUMVIA periodic function runs.
BC	batch customer conversion	You run the batch customer import from Customer Engagement. See Customer Engagement Batch Customer and Sales Integration Process Flow for more information.
BD	batch deposits	You submit auto deposits for processing. See Processing Auto Deposits (SDEP) for more information.
BR	Order Orchestration orders	The BROKER_ORD job starts in Working with Integration Layer Processes (IJCT). See Order Orchestration Integration for background.
BT	batch tokenization update	You run a batch tokenization update. See the Data Security and Encryption Guide on My Oracle Support (2953017.1).
CD	CDC async	You run the CDC async job. See Working with Drop Ship Background Jobs (WPBJ) for more information.
CL	credits by LOB	You submit line of business credits for processing. See Processing Credits by Line of Business (MCLB) for more information.
CR	catalog request	You submit the catalog request upload for processing. See Working with the Catalog Request Interface (WCRU) for more information.
CU	set component upload	You run the set component upload. See Importing Set Components (WCUP) for more information.
DS	drop ship processing	You submit drop ship orders for processing. See Selecting Vendors for Drop Ship Processing (MDSP) for more information.
KU	PICK_OUT process	You start the PICK_OUT process in Working with Integration Layer Processes (IJCT).
IO	INVOICE_OUT process	You start the INVOICE_OUT process in Working with Integration Layer Processes (IJCT).

Type	Description	Started When?
LU	line of business update	You update statistics for your line of business order queue. See Displaying the Line of Business Order Queue Summary (DLOQ) for more information.
MO	membership order generation	You generate membership orders through the Generating Membership Orders (EGMO) menu option.
MS	mass item substitution	You select the Processing Item Substitutions (PSUB) menu option.
OA	online authorization	See Performing Online Credit Card Authorizations for more information.
OB	Order Orchestration	The BROKER job starts in Working with Integration Layer Processes (IJCT). See Order Orchestration Integration for background.
PG	pick slip generation	You generate pick slips. See Performing Pick Slip Generation for more information.
QZ	purge security risk periodic function	You submit the SECRISK Periodic Function.
RE	REAUTH_JOB	You submitted the REAUTH job. See Reauthorizing Expired Authorizations for more information.
RI	retail integration item upload	You submitted the retail integration item upload. See Working with Retail Integration Item Upload (RIIU) for more information.
RO	RETURN_OUT process	You start the RETURN_OUT process in Working with Integration Layer Processes (IJCT).
RZ	reorganize	Information will be provided at a later date.
SA	batch SVC activation	You submit stored value card activations for processing, if the Use Activation / Reversal Batch Processing (I50) system control value is selected. See Transmitting Activation and Reversal Transactions (SSVC) for more information.
SB	batch SVC balance inquiry	The system submits stored value card balance inquiries in batch. See the Perform Balance Inquiry during Batch Authorizations (J19) system control value for more information.
SC	shipment and return confirmation email generation	You use the Sending Internet Order Ship Confirmation (ESCF) option or the ECSHCNF periodic function. See Stopping and Restarting Shipment and Return Confirmation Emails for information on how to stop and restart the generation program.
SI	ship via/item summary inquiry	You use the Ship Via/Item Inquiry (SVII) menu option.
SP	SKU purge	You submit a SKU purge through the Purging SKUs (MPSK) menu option.

Type	Description	Started When?
SO	process auto soldouts	You use the Process Auto Soldouts menu option; see Processing Auto Soldout Cancellations (MASO) for more information.
SR	batch SVC reversal	You process deposits that include stored value card reversals if the Perform Authorization Reversal during Deposit Processing (J20) system control value is selected. See Processing Auto Deposits (SDEP) for more information.
SU	supporting data upload	You run the supporting data upload. See Importing Item-Related Supporting Data (SDUP) for more information.
TH	threshold monitor	You start the THRESHMON background job. See Working with Threshold Values (WTHR) for more information.

Working with Integration Layer Processes (IJCT)

Purpose: Use this menu option to work with the processes that transmit data between Order Administration and an external system, such as Order Orchestration.

> **Note:**
>
> The integration layer processes are not restricted by company; when you work with or change a process, it affects all companies.

Configuration: See Advanced Queuing for information on setting up queues.

In this topic:

- Process Overview
- XML Versions
- Work with Integration Layer Process Screen
- Integration Layer Process Screen (Create Mode)
- Integration Layer Process Screen (Change Mode)
- Starting or Ending a Process
- Hiding an Integration Layer Process
- Work with Integration Layer Process Queues Screen
- Starting or Stopping Process Queues
  - Creating a Process Queue
- Integration Layer Process Queue Screen
- Work with Integration Process Control Screen
- Display Integration Process Control Screen

- Change Status Window (Integration Process Control)
- Defining Outbound Interface Trigger Rules
  – Defining Trigger Rule Values
  – Select Trigger Rules File Window
  – Outbound Interface Trigger Rules Screen
- Outbound Interface XML Inclusion Screen
- Select XML Message Version Screen
- Using the JOBCLN Function to Troubleshoot IJCT Jobs

Also, see the following for more information:

- Translating Special Characters
- Integration Layer Processes and Web Services
  – Integration Layer Processes for a brief listing of integration layer processes and links to more information. Also, see each Process for a link to more information.

    Web Services without Integration Layer Processes
  – Troubleshooting XML Messages and Integration Layer Processes

Process Overview

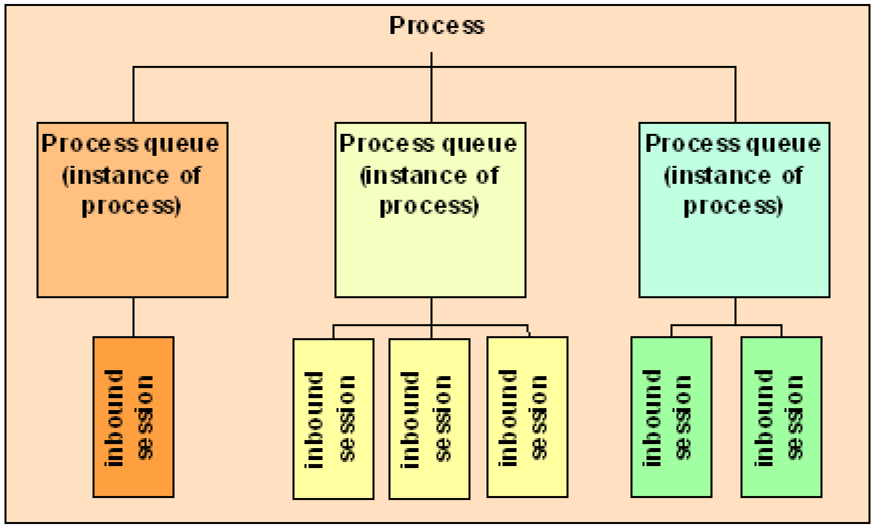
As data is processed in Order Administration, the JMS provider sends messages to the integration layer processes for processing. Processes can be one-directional or bi-directional if a response is received (for an outbound process) or generated (for an inbound process).

All messages are processed in the sequence in which they arrive at the queue.

Inbound process structure: Underneath each inbound process at the Work with Integration Layer Process Screen are one or more process queues. Multiple process queues are useful for inbound messages, so that you can receive and process messages from more than one remote system. For example, you might receive inventory transactions from both a warehouse management system and a POS system.

When there are multiple process queues, each queue is an instance of the Inbound program for the process; however, each queue should have a unique Inbound job name so that you can identify and troubleshoot each process separately.

The # inbound sessions for each process queue can be one or more. For example, you might set the number of inbound sessions higher for the process queue that processes orders from your web storefront, to prevent delays; however, you might require only one inbound session for orders you receive from a remote order entry service, because you receive these orders at a scheduled time, and an immediate response is not required.



Inbound process example:

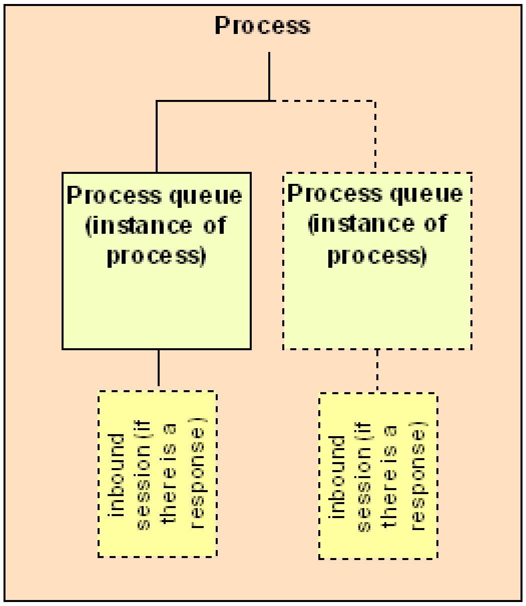
#	Step
1.	A remote system sends a message to the Inbound queue specified for an integration layer process queue in Order Administration.
2.	The process: • receives and identifies the message • parses (interprets) the XML • performs any required actions, such as building Order Administration records or submitting records to a background job for additional processing
3.	Optionally, the process sends a response using the Outbound queue specified.

Generic web service: As an alternative to sending messages directly to the inbound queue specified for each integration layer process queue, you can use the generic web service. In this situation, you send messages to the endpoint for the generic web service, which routes each message to the correct process queue and then routes the generated response. See the *Generic Web Services* for more information.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Outbound process structure: Underneath each outbound process at the Work with Integration Layer Process Screen are one or more outbound queues. Multiple outbound queues allow you to send outbound messages to more than one remote system. For example, you might send item information to your POS system and warehouse management system. If you define more than one outbound queue, the system creates a copy of the outbound message for each additional queue whose Enabled field is selected.

An outbound process requires an inbound session only when a response from the remote system is expected.



Outbound process example:

#	Step
1.	Activity in Order Administration: • generates an outbound message and sends the message to the outbound queue for the outbound process, Or • creates outbound triggers in the IL Outbound Trigger table, based on the trigger rules defined for the outbound process. See Defining Outbound Interface Trigger Rules. • When active, the outbound process looks for outbound triggers to process at defined intervals, based on the Outbound delay time field. • For each outbound trigger, the outbound process determines which elements to include in the outbound message, based on XML inclusion rules; see Outbound Interface XML Inclusion Screen. • The system then sends the generated message to the outbound queue for the outbound process. If more than one outbound queue is defined, the system creates a copy of the message to send to the additional queues that are active (the Enabled field is selected).
2.	The remote system receives the message.
3.	Optionally, the remote system sends a response using the inbound queue specified.

Message logging: See Order Administration Application Logs for information on the logs you can use to track XML messages.

XML Versions

Overview: As new elements and attributes are added to existing system-delivered XML messages processed through Integration Layer Job Control, each new version of a message is tagged with a version number. The first version of an XML message is always tagged as version 1.0, but if the next release of Order Administration adds any new attributes or elements to this XML message, this next version of the message is tagged as version 2.0.

Version compatibility: Each new attribute or element is always optional, or implied, so that the integration layer process can always process previous versions of the message.

XML version numbers vs. Order Administration release numbers: The XML version number is independent of the Order Administration release number. For example, version 2.0 of a message might be introduced in Order Administration release 23.3, while version 1.0 of another message might be introduced in Order Administration release 23.4.

About inbound XML messages: Since the integration layer processes can process any previous versions of the related inbound message, the highest version of an inbound XML message supported by an integration layer process is indicated by the Version in field at the Work with Integration Layer Process Screen. For example, if this field is set to 2.0, the integration layer process can process the message in version 1.0 and 2.0.

Not all integration layer processes receive inbound messages. The Version in field is blank for any integration layer processes that are outbound-only.

About outbound XML messages: You use the Select XML Message Version Screen to indicate which version of the outbound message the integration layer process should generate. For example, if version 1.0 and 2.0 are available for an outbound message, you could have the process generate either version. By default, the integration layer process generates version 1.0. Whichever version of the message you select will be sent to all process queues running under the integration layer process.

Outbound XML Version for EMAIL_OUT process: Version 13.0 is the current version of the CWEmailOut message. Earlier versions are not available.

Outbound XML Version for INVOIC_OUT process: Version 7.0 is the current version of the CWInvoiceOut message. Earlier versions are not available.

Outbound XML version for ITEM_OUT process: Version 1.0 of the CWItemOut message includes tags that are not currently supported. The version should be set to 2.0 for the ITEM_OUT process.

Outbound XML Version for ORDER_IN process: Version 12.0 is the current version of the CWOrderOut message. Earlier versions are not available.

Outbound XML version for PICK_OUT process: Versions 1.0 through 4.0 of the CWPickOut message include tags that are not currently supported The version should be set to 5.0 for the PICK_OUT process.

Outbound XML version for VENDOR_OUT process: Versions 1.0 of the CWVendorOut message includes tags that are not currently supported The version should be set to 2.0 for the VENDOR_OUT process.

Outbound XML version for SVC Reversal process: The SVC Reversal process (SVC_REVRSL) uses the outbound XML version defined for the SVC Activation process (SVC_OUT) to generate a stored value card authorization reversal request message. If you define an outbound XML version for the SVC Reversal process, the system ignores this version and continues to use the outbound XML version for the SVC Activation process. Typically, you would want to generate the same outbound message version for both stored value card activations and stored value card authorization reversals.

How does the system identify the current version of a message? The XML Message Version table lists the latest available version of each inbound and outbound XML message. This table is updated each time you apply a new upgrade to Order Administration.

Identifying when new attributes or elements were added to a message: Unless otherwise indicated in the XML layout, each element and attribute was included in version 1.0 of the message. See XML Messages for a listing of inbound and outbound messages processed through Working with Integration Layer Processes (IJCT), including links to the XML layouts.

Versions assigned to system-delivered messages only: Only system-delivered XML messages processed through integration layer processes support this version functionality. For example, e-commerce XML messages and unique XML messages do not support versions. See the Integration Layer Processes for a listing of system-delivered messages processed by the integration layer processes under Working with Integration Layer Processes (IJCT).

For more information see the Order Administration Web Services Guide on https://support.oracle.com My Oracle Support (ID 2953017.1).

> **Important:**
>
> You must select the latest available Outbound version for the EMAIL_OUT process in order for the email generation to work for any notification formats that use information added in versions greater than 1.0 (for example, backorder, soldout, and stored value card notifications). See *Outbound Email API* for more information.
>
> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Work with Integration Layer Process Screen

Purpose: Use this screen to review and work with integration layer processes.

Hidden processes? If a process is not listed at this screen, it might have had its Type changed to Hide Service. See Hiding an Integration Layer Process for more information.

How to display this screen: Enter IJCT in the Fast path field at the top of a menu or select Integration Layer Job Control from a menu.

Field	Description
Process	A code for an integration layer process. Processes include: • BROKER: See Order Orchestration Integration. • BROKER_ORD: See Order Orchestration Integration. • CUST_HIST: See *Generic Customer History API* • CUST_OUT: See *Generic Customer Download API* • CUST_SRCH: See *Generic Customer Inquiry (Search) API*. • CUSTOMR_IN: See *Generic Customer API*. • EMAIL_OUT: See *Outbound Email API*. • INV_DOWNLD: See *Generic Inventory Download API*. • INV_INQURY: See *Generic Inventory Inquiry API*. • INVOICE_OUT: See *Generic Invoice Download API*. • INVTRAN_IN: See *Generic Inventory Transaction Upload*. • ITEM_OUT: See *Generic Item Download API*. • ORDER_CLN: See Order Cleanup. • ORDER_IN: See *Generic Order Interface (Order API)*. • PICK_OUT: See *Generic Pick Out API*. • PO_OUT: See *Generic Outbound Purchase Order API*. • RETURN_IN: See *Inbound Return API*. • RETURN_OUT: See *Outbound Return API*. • TAX_INT: See Use Generic Tax XML Interface (J10) and the Vertex Interface. • VENDOR_OUT: See *Generic Vendor Download API*. • WORKFLOW: See Workflow Management Overview and Setup and WF (Remote Workflow) Event Processing. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Alphanumeric, 10 positions; optional.
Description	A description of the process. Alphanumeric, 45 positions; optional.
Version in	The latest version of the inbound XML message that the process is capable of processing. For example, if the Version in is 2.0, this indicates that the process works with version 1.0 or 2.0 of the inbound XML message. See XML Versions for an overview. This field is blank if the process does not process inbound XML messages. Numeric, 3 positions with a 1-place decimal; display-only.
Version out	The version of the outbound XML message that the process generates. You can select the outbound XML version at the Select XML Message Version Screen. See XML Versions for an overview. This field is blank if the process does not generate outbound XML messages. Numeric, 3 positions with a 1-place decimal; display-only.

Field	Description
Type	Indicates whether the process uses a JMS provider (advanced queuing) or a web service. Possible types are: MQ = the process uses a JMS provider, advanced queuing, to transmit and receive messages, or uses an Order Administration web service. See Advanced Queuing and *Generic Web Services*. WS = the process uses an external web service. If you have hidden a process, it is not listed on this screen. See Hiding an Integration Layer Process for more information.
Status	The status of the queue. Possible statuses are: • Active • Inactive • Starting • Ending • Interact: The CUSTOMER_IN, CUST_HIST, CUST_SRCH, CUSTOMER_IN, EMAIL_OUT, INV_INQUIRY, MERCH_LOC, ORDER_IN, RETURN_IN, TAX_INT, and WORKFLOW processes always have this status because they do not use a batch job, but process requests and responses interactively. See Starting or Ending a Process. Note: • The status is Active if any of the process queues is currently active. See the Work with Integration Layer Process Queues Screen for more information. • It is not necessary to start or stop the ORDER_IN job unless you want it to read from or write to queues. Alphanumeric, 9 positions; display-only.
Active session	The number of separate sessions that are active for all process queues. You might set up multiple sessions for each process queue of an inbound process to prevent delays in communication. Numeric, 5 positions; display-only.
Start	The date and time the process, or any of the process queues, was most recently started. The user ID of the person who started the process or any of its queues is also displayed. Date: numeric, 6 positions (in user date format); display-only. Time: numeric, 6 positions (HH:MM:SS format); display-only. User: alphanumeric, 10 positions; display-only.
End	The date and time the process, or any of the process queues, was most recently ended. The user ID of the person who ended the process or any of its queues is also displayed. Date: numeric, 6 positions (in user date format); display-only. Time: numeric, 6 positions (HH:MM:SS format); display-only. User: alphanumeric, 10 positions; display-only.

Screen Option	Procedure
Create an integration layer queue	Select Create to advance to the Integration Layer Process Screen (Create Mode).

Screen Option	Procedure
Change the settings for an integration layer process	Select Change for a process to advance to the Integration Layer Process Screen (Change Mode).
Delete an integration layer process	Select Delete for a process to delete it.
Review the details of an integration layer process	Select Display for a process to advance to the Display Integration Layer Process Screen. You cannot change any information at this screen. See the Integration Layer Process Screen (Create Mode) for field descriptions.
Start a process	Select Start for a process that is in an Inactive status to start all process queues for the process. See Starting or Ending a Process. **Note:** This option is not available for the CC_TOKEN, MERCH_LOC, EMAIL_OUT, and TAX_INT jobs because they are interactive rather than batch processes. (The SVC_BALANC process also has this status if no companies have the Perform Balance Inquiry during Batch Authorizations (J19) system control value selected.) Also, this option is not necessary for some jobs, such as the ORDER_IN. See Integration Layer Processes for a listing of jobs that indicates whether it is necessary to start or stop the job. To schedule: You can use the STRIJCT periodic function to schedule the start of the integration layer process whose Process ID is defined in the Parameter field for the periodic function. . Troubleshooting: See Using the JOBCLN Function to Troubleshoot IJCT Jobs for information.
End a process	Select End for a process to end all process queues. See Starting or Ending a Process. **Note:** This option is not available for the CC_TOKEN, MERCH_LOC, EMAIL_OUT, and TAX_INT jobs because they are interactive rather than batch processes. (The SVC_BALANC process also has this status if no companies have the Perform Balance Inquiry during Batch Authorizations (J19) system control value selected.) Also, this option is not necessary for some jobs, such as the ORDER_IN. See Integration Layer Processes for a listing of jobs that indicates whether it is necessary to start or stop the job. To schedule: You can use the ENDIJCT End IJCT Process Passed periodic function to schedule the end of the integration layer process whose Process ID is defined in the Parameter field for the periodic function. Troubleshooting: See Using the JOBCLN Function to Troubleshoot IJCT Jobs for information.
Work with the queues for a process	Select Work with Queues for a process to advance to the Work with Integration Layer Process Queues Screen, where you can start, end, or work with individual process queues. Only processes whose Type is MQ use queues.
Define trigger rules for an outbound process	Select Trigger Rules for a process to advance to the Outbound Interface Trigger Rules Screen or the Select Trigger Rules File Window. This option is not available for processes that do not use trigger rules.

Screen Option	Procedure
Define XML inclusion rules for an outbound process	Select XML Inclusion for a process to advance to the Outbound Interface XML Inclusion Screen. This option is available only for processes that use XML inclusion.
Select the XML version to use for outbound messages	Select Outbound XML Ver for a process to advance to the Select XML Message Version Screen. This option is not available for processes that do not generate outbound messages. Also, inclusion rules are not implemented for the MERCH_LOC process, which uses Order Orchestration's Locate Items messages. See Merchandise Locator API for an overview.
Work with background jobs	Select Background Jobs to advance to the Work with Background Jobs Screen.
Work with Drop Ship background jobs	Select Drop Ship Jobs to advance to the Work with Drop Ship Background Jobs Screen.

Integration Layer Process Screen (Create Mode)

Purpose: Use this screen to create an integration layer process. For example, you might create a new process similar to a system-delivered process in order to communicate with multiple authorization services.

How to display this screen: Select Create at the Work with Integration Layer Process Screen.

Field	Description
Process ID	A code for the job that performs integration layer updates between Order Administration and an external system. See Work with Integration Layer Process Screen for a description of each. Alphanumeric, 10 positions; required.
Description (unlabeled field next to Process ID**)**	A description of the subsystem job that is used when the integration layer process is active. Alphanumeric, 45 positions; required.

Field	Description
Status	The current status of the integration layer job. Possible statuses are: • Active • Inactive • Starting • Ending • Interact: The CUSTOMER_IN, CUST_HIST, CUST_SRCH, CUSTOMER_IN, EMAIL_OUT, INV_INQUIRY, MERCH_LOC, ORDER_IN, RETURN_IN, TAX_INT, and WORKFLOW processes always have this status because they do not use a batch job, but processes requests and responses interactively. The SVC_BALANC process also has this status if no companies have the Perform Balance Inquiry during Batch Authorizations (J19) system control value selected. Note: • The status is Active if any of the process queues are currently active. See the Work with Integration Layer Process Queues Screen for more information. • The status field is not implemented on the Create screen. Alphanumeric, 9 positions; display-only.
Communication type	Indicates whether the process uses a JMS provider (advanced queuing) or a web service. Possible types are: Message Queue (default) = the process uses a JMS provider, advanced queuing, to transmit and receive messages, or the job uses an Order Administration web service. See Advanced Queuing and *Generic Web Services*. Web Service = the process uses a web service that is external to Order Administration. Hide Service = this process is not used and will be hidden from the Work with Integration Layer Process Screen once you accept your entries on this screen. See Hiding an Integration Layer Process for more information. Required.
Inbound Processing:	
Inbound program	For an inbound process, the name of the job that receives and interprets the XML message from an external system to Order Administration, and performs any additional processing in Order Administration. Alphanumeric, 10 positions; optional.
Active session(s)	The total number of active sessions from the Work with Integration Layer Process Queues Screen. Set to zero on the Create screen. Numeric, 3 positions; display-only.

Field	Description
Inbound XML Msg/WSDL Doc Name	• If the Communication type field is set to Message Queue, this is the inbound message for the integration layer process to read and process. • If the Communication type field is set to Web Service, this is the name of the WSDL file for the integration layer process to read and process. **Note:** The only integration layer process that requires you to specify the name of a WSDL file in this field is the TAX_INT process. Other processes that use web services do not require you to specify a WSDL. Alphanumeric, 50 positions; optional.
Outbound Processing:	
Outbound job name	For an outbound process, the name of the job that generates the outbound XML message. Alphanumeric, 10 positions; optional.
Outbound program	For an outbound process, the name of the program that the job uses to build the XML message and send it to an external system. Alphanumeric, 10 positions; optional.
Outbound delay time	For an outbound process, this is the number of seconds to wait before checking the IL Outbound Trigger table for triggers in a ready (R) status. For outbound processes requiring additional configuration options, the system also uses the outbound delay time to determine the length of time to wait before performing a delete transaction, giving the system time to generate a delete download message. **Note:** For outbound processes that require additional configuration options, you must enter an outbound delay time. Numeric, 5 positions; optional.
Outbound XML message	The outbound message for the integration layer process to generate. Alphanumeric, 50 positions; optional.

Integration Layer Process Screen (Change Mode)

To change: Select Change for an integration layer process at the Work with Integration Layer Process Screen to advance to the Integration Layer Process screen in Change mode. See the Integration Layer Process Screen (Create Mode) for field descriptions.

Starting or Ending a Process

Overview: You can start or stop the Integration Layer processes at the Work with Integration Layer Process Screen by selecting Start or End, if the process is not currently active.

When you select to start a process, the system first confirms that the process is not currently running on any server. If not, the system changes its status from Inactive to Starting to Active.

When you select to end a process, the system first confirms that the process is currently running on any server. If is currently running, the system changes its status from Active to Ending to Inactive. There may be a delay while the process completes processing all records that existed when the process began.

> **Note:**
>
> If you end a process while it is in the "resting period" defined in the Outbound Delay Time, the process does not check to see if it should be ending until the Outbound Delay Time is over. So if, for example, the Outbound Delay Time is 15 minutes and the resting period just started, then the process does not end for almost 15 minutes.

Ending an individual process queue: If you end an individual process queue for a process and another process queue is still active, the system updates the status of the integration layer process to Ending. The process will remain in an Ending status until you end the other active process queue(s) for the integration layer process.

For information on how to start or end individual process queues for a process, see the Work with Integration Layer Process Queues Screen.

> **Note:**
>
> If you have more than one enabled integration layer process queue, the system may update the Active session field for the integration layer process to 1, even though more than one session actually went active on the Job Management Screen and Work with Integration Layer Process Queues Screen. In this situation, stop the integration layer process again and restart it so that the number of Active sessions matches the number of sessions that have actually started.

Interactive processes: This option is not available for the CUSTOMER_IN, CUST_HIST, CUST_SRCH, CUSTOMER_IN, EMAIL_OUT, INV_INQUIRY, MERCH_LOC, ORDER_IN, RETURN_IN, TAX_INT, and WORKFLOW jobs because they are interactive rather than batch processes. The SVC_BALANC process also has this status if no companies have the Perform Balance Inquiry during Batch Authorizations (J19) system control value selected. Also, this option is not necessary for some jobs, such as the ORDER_IN. See Integration Layer Processes for a listing of jobs that indicates whether it is necessary to start or stop the job.

Scheduling when an integration layer process starts and stops: You can schedule a periodic function to start or stop an integration layer process at a particular time. See Scheduling Jobs and Additional Interface (INT) Periodic Functions for more information on how to schedule a periodic function and for a list of the periodic functions used to start and stop the integration layer jobs.

Hiding an Integration Layer Process

Purpose: You can hide an unused integration layer process in order to simplify the information displayed at the Work with Integration Layer Process Screen.

Which processes are eligible to be hidden? You can hide a process only if:

- its current status is Inactive or Interactive

- it does not have any process queues set up through the Work with Integration Layer Process Queues Screen, or all existing process queues have the Enabled flag unselected

Before you hide a process: You should confirm that it is not a process that you are currently using or will need to use in the near future. For example, if you hide:

- TAX_INT: You will not be able to use the integration with Vertex or AvaTax.
- Outbound processes (such as ITEM_OUT, PO_OUT): Messages will not generated.
- Inbound processes (such as INVTRAN_IN): Messages will not be received and processed. In the case of an interactive process, no response message will be generated.
- EMAIL_OUT: You will not be able to send the CWEmailOut message for any template whose XML only? flag is selected; however, the system will continue to generate email notifications for email templates whose XML only? flag is not selected. See Working with E-Mail Notification Templates (WEMT) for more information.

> **Note:**
>
> If you have already configured the merchandise locator integration with Order Orchestration, this integration will continue to work after you hide the MERCH_LOC process.

Also, you should confirm that you do not have one of the Interface (INT) Periodic Functions to Start and Stop IJCT Jobs set up for a process that you are going to hide. If you do, the periodic function might start the process, even though it is hidden.

How to hide a process: At the Integration Layer Process Screen (Change Mode), change the Communication type to Hide Service.

How to show a hidden process: Once a process is hidden, you cannot show it again through an option at a screen in Order Administration. Instead, Oracle staff will need to query the Integration Layer Process table (MSILPR) and reset the ILP Communication type field from H to MQ (if the type was previously Message Queue) or WS (if the type was previously Web Service).

> **Note:**
>
> The JOBCLN periodic function does not update a job in H (hidden) status.

The BROKER, BROKER_ORD, MERCH_LOC, and TAX_INT processes use the Web Service type; the other processes use the Message Queue type.

Work with Integration Layer Process Queues Screen

Purpose: Use this screen to work with the process queues that run for each process displayed at the Work with Integration Layer Process Screen. Inbound processes might have multiple process queues if you receive messages from multiple remote systems; similarly, outbound processes might have multiple process queues if you broadcast messages to multiple remote systems. See Process Overview for more information on how processes relate to process queues.

It is not necessary to set up queues for a process that uses an external web service (Type at the Work with Integration Layer Process Queues Screen = WS).

> **Note:**
>
> You cannot create multiple process queues for the CUSTOMER_IN, CUST_HIST, CUST_SRCH, CUSTOMER_IN, EMAIL_OUT, INV_INQUIRY, MERCH_LOC, ORDER_IN, RETURN_IN, TAX_INT, and WORKFLOW processes. If you create multiple process queues for any of these processes, the system will only process messages for the queue with a sequence number of 1.

How to display this screen: Select Work with Queues for a process at the Work with Integration Layer Process Screen.

Field	Description
Process ID	The process you selected at the Work with Integration Layer Process Screen. The description is to the right. Alphanumeric, 10 positions; display-only.
Sequence	A unique sequence number to identify a queue for a process. You cannot create multiple process queues for the CC_TOKEN, SVC_OUT, SVC_BALANC, SVC_REVRSL, MERCH_LOC, or EMAIL_OUT processes. If you create multiple process queues for any of these processes, the system only processes messages for the queue with a sequence number of 1. Numeric, 3 positions; optional.
Description	The description of the process queue. Alphanumeric, 30 positions; optional.
Active sessions	The number of inbound sessions that are currently active for each process queue. You might have more than one active session for a process queue to prevent delays in responses; for example, you might have multiple active sessions for the process queue that receives new orders from your web storefront. **Note:** Active sessions do not apply to outbound processing. Numeric, 5 positions; display-only.
Start	The date and time the process queue was most recently started. The user ID of the person who started the process queue is also displayed. **Note:** This field is not displayed for outbound queues. Date: numeric, 6 positions (in user date format); display-only. Time: numeric, 6 positions (HH:MM:SS format); display-only. User: alphanumeric, 10 positions; display-only.

Field	Description
End	The date and time the process queue was most recently ended. The user ID of the person who ended the process queue is also displayed. **Note:** This field is not displayed for outbound queues. Date: numeric, 6 positions (in user date format); display-only. Time: numeric, 6 positions (HH:MM:SS format); display-only. User: alphanumeric, 10 positions; display-only.

Option	Procedure
Create a new process queue	Select Create to create a new queue for the selected process. You advance to the Integration Layer Process Queue Screen in Create mode. **Note:** You cannot create multiple process queues for the CC Token Process, SVC Activation, SVC Balance Inquiry, SVC Reversal, MERCH_LOC, or EMAIL_OUT processes.
Change a process queue	Select Change for a process queue to work with it. You advance to the Integration Layer Process Queue Screen in Change mode.
Delete a process queue	Select Delete for a process queue to delete it.
Display a process queue	Select Display for a process queue to advance to the Integration Layer Process Queue Screen in Display mode; all fields will be display-only.
Start a process queue	Select Start for a process queue to start it. If none of the other process queues were currently active, the status of the process at the Work with Integration Layer Process Screen changes to Active. The Start date, time, and user indicated for the process are also updated. Note: • The Enabled flag for the process queue must be selected for you to be able to start it. • Starting and stopping a process queue is not available for the CUSTOMER_IN, CUST_HIST, CUST_SRCH, CUSTOMER_IN, EMAIL_OUT, INV_INQUIRY, MERCH_LOC, ORDER_IN, RETURN_IN, TAX_INT, and WORKFLOW jobs because they are interactive rather than batch processes. Also, this option is not necessary for some jobs, such as the ORDER_IN. See Integration Layer Processes for a listing of jobs that indicates whether it is necessary to start or stop the job.
End a process queue	Select End for a process queue to end it. If none of the other process queues were currently active, the status of the process at the Work with Integration Layer Process Screen changes to Inactive. The End date, time, and user indicated for the process are also updated.
View status of a batch of messages in a queue	Select View batch status for a process queue to advance to the Work with Integration Process Control Screen.

Option	Procedure
Start all process queues for the process	Select Start all to start all process queues for the selected process. The status of the process at the Work with Integration Layer Process Screen changes to Active. The Start date, time, and user indicated for the process are also updated. Note: • Only process queues whose Enabled flag is selected will start. • Starting and stopping a process queue is not available for the CUSTOMER_IN, CUST_HIST, CUST_SRCH, CUSTOMER_IN, EMAIL_OUT, INV_INQUIRY, MERCH_LOC, ORDER_IN, RETURN_IN, TAX_INT, and WORKFLOW jobs because they are interactive rather than batch processes. Also, this option is not necessary for some jobs, such as the ORDER_IN. See Integration Layer Processes for a listing of jobs that indicates whether it is necessary to start or stop the job.
End all process queues for the process	Select End all to end all process queues for the selected process. The status of the process at the Work with Integration Layer Process Screen changes to Inactive. The End date, time, and user indicated for the process are also updated.

Starting or Stopping Process Queues

You can start or stop processes in two ways:

- All existing process queues for a process:
  - At the Work with Integration Layer Process Screen: see Starting or Ending a Process.
  - At the Work with Integration Layer Process Queues Screen: see below.
- **Individual process queues for a process:** At the Work with Integration Layer Process Queues Screen:
  - Starting a process queue: Select Start for a process queue to start it. If none of the other process queues were currently active, the status of the process at the Work with Integration Layer Process Screen changes to Active. The Start date, time, and user indicated for the process are also updated. **Note:** The Enabled flag for the process queue must be selected for you to be able to start it.
  - Ending a process queue: Select End for a process queue to end it. If none of the other process queues were currently active, the status of the process at the Work with Integration Layer Process Screen changes to Inactive. If one of the other process queues is currently active, the status of the process at the Work with Integration Layer Process Screen changes to Ending; the process will remain in an Ending status until you end the other active process queue(s) for the integration layer process.The End date, time, and user indicated for the process are also updated.

> **Note:**
>
> The BROKER_ORD job checks on whether it needs to end or to continue processing each time it has processed requests for all eligible companies and the Outbound Delay Time has passed.

Interactive processes: Starting and stopping a process queue is not available for the CUSTOMER_IN, CUST_HIST, CUST_SRCH, CUSTOMER_IN, EMAIL_OUT, INV_INQUIRY, MERCH_LOC, ORDER_IN, RETURN_IN, TAX_INT, and WORKFLOW jobs because they are interactive rather than batch processes. Also, this option is not necessary for some jobs, such as the ORDER_IN. See Integration Layer Processes for a listing of jobs that indicates whether it is necessary to start or stop the job.

System started: The system automatically starts a process queue for the SVC Activation, and SVC Reversal processes if a message is requested or received and the process is not currently running.

Starting or stopping all process queues for a process at the Work with Integration Layer Process Queues Screen:

- Starting all process queues for a process: Select Start all to start all process queues for the selected process. The status of the process at the Work with Integration Layer Process Screen changes to Active. The Start date, time, and user indicated for the process are also updated. **Note:** Only process queues whose Enabled flag is selected will start.
- Ending all process queues for a process: Select End all to end all process queues for the selected process. The status of the process at the Work with Integration Layer Process Screen changes to Inactive. The End date, time, and user indicated for the process are also updated.

Interactive processes: Starting and stopping a process queue is not available for the CUSTOMER_IN, CUST_HIST, CUST_SRCH, CUSTOMER_IN, EMAIL_OUT, INV_INQUIRY, MERCH_LOC, ORDER_IN, RETURN_IN, TAX_INT, and WORKFLOW jobs because they are interactive rather than batch processes. The SVC_BALANC process is also interactive if no companies have the Perform Balance Inquiry during Batch Authorizations (J19) system control value selected. Also, this option is not necessary for some jobs, such as the ORDER_IN. See Integration Layer Processes for a listing of jobs that indicates whether it is necessary to start or stop the job.

Which job queue? The integration layer jobs run automatically in the QSYSNOMAX job queue in order to avoid slowing down any other jobs that might be running in other job queues on the system.

Integration Layer Process Queue Screen

Purpose: Use this screen to create, change, or display a process queue for an integration layer process.

How to display this screen: At the Work with Integration Layer Process Queues Screen:

- Select Create to advance to this screen in Create mode.

Note:

You cannot create multiple process queues for the SVC_OUT, SVC_BALANC, SVC_REVRSL, MERCH_LOC, or EMAIL_OUT processes.

- Select Change for a process queue to advance to this screen in Change mode.
- Select Display for a process queue to advance to this screen in Display mode. All fields will be display-only.

Field	Description
Process ID	The Process ID for the selected process. The description of the process is to the right. Process ID: alphanumeric, 10 positions; display-only. Process description: alphanumeric, 45 positions; display-only.
Description	The description of the process queue to run for the integration layer process. For example, for an inbound process, you might use this field to indicate the source of the messages. Alphanumeric, 30 positions; required.
Enabled	Indicates whether the process queue can process messages. Valid values are: • Selected = You can start the process queue. • Unselected = You cannot start the process queue. **Note:** If this field is unselected for all process queues, you will not be able to start the process. For outbound processing, the system sends the outbound message to queues only if their Enabled field is selected.
# inbound sessions	The number of sessions to run under this process queue. You might run multiple sessions for process queues that require an immediate response, such as the process queue that receives new order messages from the web storefront. Multiple sessions are used only for inbound process queues; outbound processes should have this field set to 1 for their process queues. **Note:** If you leave this field blank, you will not be able to start the process queue. If this field is blank for all process queues for a process, you will not be able to start the process. Numeric, 5 positions; required.
Wait time	The number of seconds Order Administration waits for a response from an external system. Used only for two-way interfaces (outbound/inbound). If the message waits on the target queue longer than this number of seconds the message is automatically deleted. Numeric, 6 positions; optional.
Inbound Processing:	
Active session (s)	Indicates the number of sessions that are currently active for this process queue. Included in Change or Display mode only. Numeric, 5 positions; display-only.
Inbound queue manager	This field is currently implemented. Alphanumeric, 48 positions; optional.

Field	Description
Inbound queue	The queue in the queuing database where this process queue reads messages originating from the remote server or system. Required for inbound process queues. Alphanumeric, 48 positions; optional.
Inbound XML message	The name of the inbound XML message; informational only. Alphanumeric, 50 positions; optional.
Inbound job name	The name of the job that interprets the XML message from the external system to Order Administration. This is the Job Name listed on the Job Management screen, available through the My Jobs option. If there are multiple process queues for a process, each instance of the job should have a unique name. Required for inbound process queues. Alphanumeric, 10 positions; optional.
Outbound Processing:	
Outbound queue manager	This field is not currently implemented. Alphanumeric, 48 positions; optional.
Outbound queue	The queue to which this process queue sends messages for transmission to the remote server. Required for outbound process queues. Alphanumeric, 48 positions; optional.
Outbound XML message	The name of the outbound XML message; informational only. Alphanumeric, 50 positions; optional.

Creating a Process Queue

> **Note:**
>
> You cannot create multiple process queues for the SVC_OUT, SVC_BALANC, SVC_REVRSL, MERCH_LOC, or EMAIL_OUT processes.

1. At the Work with Integration Layer Process Queues Screen, select Create to advance to this screen in Create mode.
2. Complete the Description and set the Enabled flag, and then any additional fields required for the process queue. Select OK to accept your entries.

Work with Integration Process Control Screen

Purpose: Use this screen to review the status of a batch of messages. This screen is useful if you need to troubleshoot the location of a batch message.

Each batch status represents a record in the Integration Process Control table. The system creates a record in the Integration Process Control table when the system sends or receives a batch of messages via an integration layer process.

Purging integration process control records: When one of the integration layer jobs listed above becomes active (from a user manually starting the job, through a periodic function, or through the job starting automatically), the system submits the ILPURGE job to determine if any of the records in the Integration Process Control table should be purged. If the integration process control record has an ILC date stamp that is over 7 days old, the system removes the record from the Integration Process Control table.

Purpose: Select View batch status for a process queue at the Work with Integration Layer Process Queues Screen.

Batch status records on this screen sort in descending date and time sequence.

Field	Description
Process	The name and description of the batch integration layer process whose integration process control records you are reviewing. Code: alphanumeric, 10 positions; display-only. Description: alphanumeric, 45 positions; display-only.
Queue Name	A unique sequence number to identify a queue for a process, and the description of the process queue. Queue: numeric, 3 positions; display-only. Description: alphanumeric, 30 positions; display-only.
Job	The job name for the process associated with the integration process control record. For example, PICK_GEN indicates a integration process control record created for the Batch CC Authorization integration layer process; these records represent a batch of credit card authorizations sent to the authorization service. Alphanumeric, 10 positions; optional.

Field	Description
Status	The status of the integration process control record. Normal transmissions process through the following statuses: TRF, SNT, RCV, RIN, CMP. TRF Unknown status indicates the batch message is unknown and has not been transmitted. SNT Sent indicates the batch message transmission has been sent to the external system. RCV Received (IDC Server) indicates the batch message transmission has been received from the external system and all background processing for the batch is complete. A batch may remain in a received status if the associated job, such as pick slip generation, has timed out or moved on before the batch could be updated to Complete. No further action is required for a batch that remains in a Received status. RIN Receiving indicates the batch message transmission is in the process of being received. CMP Complete indicates the batch message has been completed. FLD Error (Sending) indicates the batch message transmission has failed. Note: • If the Immediate response field for the service bureau is selected, completed records remain in a RCV status and never update to CMP. • If the integration process control record is in a sent or error status, the system will continue to wait for a response for that record. You must resolve any errors before receiving the next transaction. Status code: Alphanumeric, 3 positions; optional. Status description: Alphanumeric, 24 positions; display-only.
Date	The date the batch message transmission was sent to or received from an external system. Numeric, 6 positions (in user date format); display-only.
Time	The time the batch message transmission was sent to or received from an external system. Numeric, 6 positions (HH/MM/SS format); display-only.
Reference ID	The next available number from the Batch Auth File Trace Number number assignment value. Numeric, 16 positions; display-only.

Screen Option	Procedure
Delete an integration process control record	Select Delete for an integration process control record to delete it.
Review an integration process control record	Select Display for an integration process control record to advance to the Display Integration Process Control Screen.

Screen Option	Procedure
Change the status of an integration process control record that is not yet complete	Select Change status for an integration process control record to advance to the Change Status window. You cannot change the status of an integration process control record that is in CMP complete status.

Display Integration Process Control Screen

Purpose: Use this screen to review the details of an integration process control record. This screen is useful if you need to troubleshoot the location of a batch message.

How to display this screen: Select Display for an integration process control record at the Work with Integration Process Control Screen.

Field	Description
Process	The name and description of the batch integration layer process whose integration process control records you are reviewing. Code: alphanumeric, 10 positions; display-only. Description: alphanumeric, 45 positions; display-only.
Queue	A unique sequence number to identify a queue for a process, and the description of the process queue. Queue: numeric, 3 positions; display-only. Description: alphanumeric, 30 positions; display-only.
Job #	The job number for the process associated with the integration process control record; this is the process that sent the batch message. Alphanumeric, 6 positions; display-only.
Job name	The job name for the process associated with the integration process control record. For example, PICK_GEN indicates an integration process control record created for the Batch CC Authorization integration layer process; these records represent a batch of credit card authorizations sent to the authorization service. Alphanumeric, 10 positions; display-only.
User	The user ID of the person who submitted the process associated with the batch messages. Alphanumeric, 10 positions; display-only.

Field	Description
Status	The status of the integration process control record. Normal transmissions process through the following statuses: TRF, SNT, RCV, RIN, CMP. TRF Unknown status indicates the batch message is unknown and has not been transmitted. SNT Sent indicates the batch message transmission has been sent to the external system. RCV Received (IDC Server) indicates the batch message transmission has been received from the external system and all background processing for the batch is complete. A batch may remain in a received status if the associated job, such as pick slip generation, has timed out or moved on before the batch could be updated to Complete. No further action is required for a batch that remains in a Received status. RIN Receiving indicates the batch message transmission is in the process of being received. CMP Complete indicates the batch message has been completed. FLD Error (Sending) indicates the batch message transmission has failed. **Note:** If the integration process control record is in a sent or error status, the system will continue to wait for a response for that record. You must resolve any errors before receiving the next transaction. Status code: Alphanumeric, 3 positions; optional. Status description: Alphanumeric, 24 positions; display-only.
Date	The date the batch message transmission was sent to or received from the external system. Numeric, 6 positions (in user date format); display-only.
Time	The time the batch message transmission was sent to or received from the external system. Numeric, 6 positions (HH/MM/SS format); display-only.
Reference ID	The next available number from the Batch Auth File Trace Number number assignment value. Numeric, 16 positions; display-only.
Comment	Informational error message regarding the batch message transmission, indicating a transmission error has occurred. Alphanumeric, 60 positions; display-only.

Change Status Window (Integration Process Control)

Purpose: Use this window to change the status of an integration process control record. You might change the status of a record if you experienced communication problems and need to re-send or receive transactions.

You cannot change an integration process control record that is already in a CMP Complete status: Status Already Complete.

How to display this window: Select Change status for an integration layer process control record at the Work with Integration Layer Process Queues Screen.

To change: Select a status and click OK to update the integration process control record to that status.

- Complete indicates the batch message has been completed.
- Failed indicates the batch message transmission has failed.
- Ready indicates the batch message is ready for transmission.
- Received indicates the batch message transmission has been received from the external system.
- Sent indicates the batch message transmission has been sent to the external system.
- Transferred indicates the batch message has been transmitted.

Defining Outbound Interface Trigger Rules

Outbound interface trigger rules are the criteria a transaction must meet in order for the system to create an IL outbound trigger. For each outbound process, you can create trigger rules for certain tables. For example, you can create trigger rules for the Item table and SKU table to control the Item Outbound job. If you enter more than one criterion, the record must meet all of the criteria in order to generate a trigger.

Example: For the ITEM_OUT process, you can specify to create item download triggers for SKUed items in company 555 that are located in warehouse 20. To do this, for the Item table trigger rules, select a Test of Equal and enter 555 as the Value for the Company trigger field, and select a Test of Equal and enter 'Y' as the Value for the Allow SKU's trigger field. For the SKU table trigger rules, select a Test of Equal and enter 20 as the Value for the Warehouse trigger field.

Item table criteria	SKU table criteria	Results
The Company field must equal 27 or 555. The Allow SKUs field must equal 'Y'.	The Warehouse field must equal 20.	The system generates a SKU trigger only if the item/SKU being created, updated, or deleted is in company 27 or company 555 and the item is SKU'd and the SKU is located in warehouse 20. If the item/SKU does not meet all of the criteria, no trigger is created.

You can create trigger rules for the following outbound processes.

For IL Process job:	you can create trigger rules for:	Example:
CUST_OUT	Company, Customer class, Inactive?, and Country fields	You can specify to create Customer Download messages only for active customers in the US and Canada. To do this: • Select a Test of Not Equal for the Inactive? flag and enter Y as the Value • Select a Test of Equal for the Country field and enter 'USA CAN' as the Value (assuming those are the country codes you are using)

For IL Process job:	you can create trigger rules for:	Example:
ITEM_OUT	Item (INITEM) SKU (INSKU)	You can specify to only create item download triggers for company 555, items that are SKU'ed and whose SKUs are located in warehouse 20. To do this: • in the Item table trigger rules, select a Test of Equal and enter 555 as the Value for the Company trigger field, and select a Test of Equal and enter Y as the Value for the Allow SKU's trigger field. • In the SKU table trigger rules, select a Test of Equal and enter 20 as the Value for the Warehouse trigger field. See *Item Outbound Trigger Rules*.
INVOIC_ OUT	Invoice Header (OEINHD) Order Header (OEORDR)	You can specify to only create invoice download triggers for debit invoices and not credit invoices. To do this, select a Test of Equal and enter I as the Value for the Invoice type trigger field.
INV_ DOWNLD	Item (INITEM) Item Warehouse (INIWRE) SKU (INSKU) Warehouse (INWRHS Item UPC (ITMUPC)	You can specify to exclude drop ship items, non-inventory items, and membership items. To do this, select a Test of Equal and enter Y as the Value for the Drop ship item, Non-inventory, and Membership trigger fields.
PICK_OUT	Pick Control Header (FLPCTH)	You can specify by company only.
PO_OUT	Purchase Order Header (POH)	You can specify to only create purchase order download triggers for purchase orders that are created, closed, cancelled in company 12 and vendor 10001. To do this, select a Test of In and enter 12 as the Value for the Company trigger field and select a Test of Equal and enter 10001 as the Value for the Vendor trigger field.

For IL Process job:	you can create trigger rules for:	Example:
RETURN_OUT	Order Header (OEORDR)	You can specify to only create return authorization download triggers for return authorizations that are created, changed or deleted in company 7 or 555 and are associated with orders whose order type is W. To do this, select a Test of In and enter 7 555 as the Value for the Company trigger field, and select a Test of Equal and enter W as the Value for the Order Type trigger field.
VENDOR_ OUT	Vendor (POVEND)	You can specify to create vendor download triggers only for companies 27 and 555 and vendor 202. To do this, select a Test of In and enter 27 555 as the Value for the Company trigger field, and select a Test of Equal and enter 202 as the Value for the Vendor # trigger field.

> **Note:**
>
> Applying trigger rules for the BROKER job is not currently implemented.

Defining Trigger Rule Values

To create a trigger rule, select the fields in the table that should control trigger creation. For each trigger field, define:

- a Test value: indicates how the system compares the record against the trigger rule criteria.
- a Value: defines the trigger rule criterion.

Example: For the Company trigger field, select a Test of Equal and enter 555 as the Value field. This indicates the system creates IL outbound triggers only for company 555.

Field type: The T (type) field indicates if the value you enter must be numeric or alphanumeric.

- N = the Value must be numeric.
- A = The Value is alphanumeric.

Note:

- Enter alphanumeric values between single quotes: for example, ’Y’.
- When entering a list or range of alphanumeric values, separate each value with a space: for example, ’S F V’.
- When entering a list or range of numeric values, separate each value with a comma: for example, 2,5,7.
- If you select a Test value for a field you must also enter a Value, and vice versa.
- The system does not validate that the value you enter for a trigger field is valid (if the field requires valid values) or is within the maximum field positions (for example, the Company field is 3 positions). Refer to your Database Listing to review field attributes for a table.
- Fields that are in the table but are not included in the XML message are not included as a trigger field.

Test value	Description
blank	A trigger rule is not specified for the field.
Between (falls within a defined range)	The field must fall within the trigger rule value range. For example, the Ship via must fall within 1 and 5.
Equal	The field must equal the trigger rule value. For example, the Company field must equal 555.
Greater than	The field must be greater than the trigger rule value. For example, the Cost field must be greater than 5.00.
Greater than or equal	The field must be greater than or equal to the trigger rule value. For example, the Cost field must be greater than or equal to 5.00.
In (equal to a listed value)	The field must match a trigger rule value. For example, the Company field must match 27, 409, or 555.
Less than	The field must be less than the trigger rule value. For example, the Cost field must be less than 500.00.
Less than or equal	The field must be less than or equal to the trigger rule value. For example, the Cost field must be less than or equal to 500.00.
Not Between	The field must not fall within the trigger rule value range. For example, the Postal code must not be between 96700 and 96899.
Not Equal	The field must not be equal to the trigger rule value. For example, the Company field must not be 25.
Not In (not equal to a listed value)	The field must not match a trigger rule value. For example, the Company field must not be 25 or 444.

Select Trigger Rules File Window

Purpose: This window opens if you can define trigger rules for more than one table. If a process has only one table available for trigger rules, you advance directly to the Outbound Interface Trigger Rules Screen for this process.

How to display this window: Select Trigger Rules for an outbound process for which you can create trigger rules for more than one table.

Field	Description
Process	The code and name of the process for which you are creating trigger rules. Alphanumeric, 10 positions; display-only.
File name	The table for which you are creating trigger rules. Select a table to advance to the Outbound Interface Trigger Rules Screen. Alphanumeric, 10 positions; optional.

Outbound Interface Trigger Rules Screen

Purpose: Use this screen to define trigger rules for an outbound job.

The appearance of this screen varies based on the outbound process for which you are defining outbound trigger rules.

Using this screen: See Defining Outbound Interface Trigger Rules for a discussion.

How to display this screen:

- Select Trigger Rules for an outbound process at the Work with Integration Layer Process Screen.
- Select a table at the Select Trigger Rules File Window.

Field	Description
Process ID	The code and name of the outbound process for which you are creating trigger rules. Alphanumeric, 10 positions; display-only.
File name	The table for which you are creating trigger rules. Alphanumeric, 10 positions; display-only.
Field	The field in the table for which you can create a trigger rule. When evaluating a record to determine whether to create an IL outbound trigger, the system compares the record’s field value against the trigger rule for the field. Alphanumeric, 15 positions; display-only.

Field	Description
Test	Indicates how the system compares the record against the trigger rule criteria. blank = A trigger rule is not specified for the field. Between (falls within a defined range) = The field must fall within the trigger rule value range. For example, the Ship via must fall within 1 and 5. Equal = The field must equal the trigger rule value. For example, the Company field must equal 555. Greater than = The field must be greater than the trigger rule value. For example, the Cost field must be greater than 5.00. Greater than or equal = The field must be greater than or equal to the trigger rule value. For example, the Cost field must be greater than or equal to 5.00. In (equal to a listed value) = The field must match a trigger rule value. For example, the Company field must match 27, 409, or 555. Less than = The field must be less than the trigger rule value. For example, the Cost field must be less than 500.00. Less than or equal = The field must be less than or equal to the trigger rule value. For example, the Cost field must be less than or equal to 500.00. Not Between = The field must not fall within the trigger rule value range. For example, the Postal code must not be between 96700 and 96899. Not Equal = The field must not be equal to the trigger rule value. For example, the Company field must not be 25. Not In (not equal to a listed value) = The field must not match a trigger rule value. For example, the Company field must not be 25 or 444. Alphanumeric, 5 positions; optional.
Value	Defines the trigger rule criterion. The system compares the trigger field value against the value of this field in each record. • If the record meets the trigger rule criteria, the system creates an IL outbound trigger. • If the record does not meet the trigger rule criteria, the system does not create an IL outbound trigger. When entering alphanumeric values, you must enter the value between single quotes; for example 'Y'. When entering a list or range of values, separate each value with a space; for example, 27 555 or 'S F V'. If you define a Value here, you must also select a Test value. Alphanumeric, 50 positions; optional.
Type	Indicates if the value you enter is numeric or alphanumeric. N = numeric A = alphanumeric **Note:** Enter alphanumeric values between single quotes; for example 'Y'. Alphanumeric, 1 position; display-only.

Outbound Interface XML Inclusion Screen

XML inclusion defines which elements to include in a download message.

- If the element is included, that element and its parents are included in the generated download XML message.
- If the element is excluded, that element and its children are excluded from the generated download message.

Remember: Parent elements are those elements that nest other elements; any elements nested underneath the parent element are its children.

Example: Some of the elements in the generic item download message are displayed below. In this example: Item is the parent of ItemInformation and ItemInformationDetail. ItemInformation is the parent of ItemInformationDetail and the child of Item. ItemInformationDetail is the child of ItemInformation and Item.

```
Item

SKU

UPC

Warehouse

ItemWarehouse
```

- If you include the Item element, you can still exclude the SKU element. If you exclude the Item element, the SKU element and its children (UPC, Warehouse, and ItemWarehouse) are also excluded.
- If you include the UPC element, the system automatically includes the SKU element. You can still exclude the Warehouse element.
- If you exclude the Item element, the process still generates an “empty” message with just the top element information. For example, if you exclude the entire message for the INV_DOWNLD process, the resulting “empty” message would resemble:

```
<Message source="OROACS" target="cwi"
type="CWInventoryDownload" date="02112006" time="10:38:10">

</Message>
```

This screen appears different based on the outbound process for which you are defining XML inclusion rules.

> **Important:**
>
> After you change XML inclusion rules, they do not take effect until after you restart the application.

You can define XML inclusion rules for the following outbound processes:

For IL Process job:	You can create XML inclusion rules for:
CUST_OUT	parent and child elements included in the *Customer Download XML Message (CWCustomerDownload)*. See *Customer Outbound XML Inclusion* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
ITEM_OUT	parent and child elements included in the *Item Download XML Message (CWItemOut)*. See *Item Outbound XML Inclusion*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
VENDOR_OUT	parent and child elements included in the *Vendor Download XML Message (CWVendorOut)* See *Vendor Outbound XML Inclusion*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
INVOIC_OUT	parent and child elements included in the *Invoice Download XML Message (CWInvoiceOut)*. See *Invoice Outbound XML Inclusion*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
INV_DOWNLD	parent and child elements included in the *Inventory Download XML Message (CWInventoryDownload)*. See *Inventory Download XML Inclusion.*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
PICK_OUT	parent and child elements included in the Pick Message from Order Administration (CWPickOut). See *Pick Out Processing*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

> **Note:**
>
> Although you can display XML inclusion options for the MERCH_LOC process, these options are not currently implemented.

When you first advance to the screen in your environment, all elements are included.

How to display this screen: Select XML inclusion for an outbound process at the Work with Integration Layer Process Screen.

Field	Description
Process ID	The code and name of the outbound process for which you are creating XML inclusion rules. Alphanumeric, 10 positions; display-only.

Field	Description
Include	Indicates whether the element is included in the download XML message. selected = the element and its parent(s) are included in the XML message. unselected = the element and its children are not included in the XML message. Select Include for an element to include it and its parents in the generated XML messages. The system updates this field for the element and its parents to selected. Select Exclude for an element to exclude it and its children in the generated XML messages. The system updates this field for the element and its children to unselected.
Element	The name of an element tag to include or exclude in the download XML message. Alphanumeric, 30 positions; optional.

Screen Option	Procedure
Include the element tag and its parents	Select Include for an element. The Include field for the element and its parents updates to Y.
Exclude the element tag and its children	Select Exclude for an element. The Include field for the element and its children updates to N.

Select XML Message Version Screen

Purpose: Use this screen to select the version of an outbound XML message to be generated by a system-delivered integration layer job. By default, each process generates version 1.0, but you can select a higher version if it is available. See XML Versions for an overview.

How to display this screen: Select Outbound XML Ver for a process at the Work with Integration Process Control Screen. This option is not available for processes that do not generate outbound XML messages.

Completing this screen: Select the XML version you would like to generate. Afterward, stop and restart the process at the Work with Integration Process Control Screen to have your change take effect.

Using the JOBCLN Function to Troubleshoot IJCT Jobs

Use the JOBCLN periodic function to resolve issues with the status of IJCT jobs. This periodic function updates IJCT job status as follows:

Note:

The JOBCLN function does not resolve issues with hidden jobs or with Interact jobs (CUSTOMER_IN, CUST_HIST, CUST_SRCH, CUSTOMER_IN, EMAIL_OUT, INV_INQUIRY, MERCH_LOC, ORDER_IN, RETURN_IN, TAX_INT, and WORKFLOW). Also, it does not resolve issues with the SVC_BALANC job unless there is at least one company that has Perform Balance Inquiry during Batch Authorizations (J19) selected.

For other IJCT jobs, the JOBCLN function does the following:

- If job has neither an Inbound or Outbound program specified, set to INACTIVE if in any other status.
- If the job is currently running (at least one process queue active):
  - If the status is INACTIVE, update to ACTIVE; otherwise, do not change status.
  - Reset the active session count if it is not correct.
  - If the job uses an active procedure (see Purge Active Procedures Across Users (MACX)) and there is currently no active procedure for the job, create it.
  - If the job is in END, FINISHED, or MSG at the Job Management (My Jobs) screen, update status to RUN and update Job History (Display Job History (DJHY)).
- If the job does not have any process queues currently running:
  - If the status is ACTIVE, STARTING, or ENDING, update to INACTIVE.
  - Set the active session count to 0 if it is greater than 0.
  - If there is an active procedure, delete it.
  - If the job is in any status but END at the Job Management screen, update it to END and update Job History.
- Deletes any existing END records for the job so that the job will remaining running when it is restarted.

Running Period End Processing

Topics in this part:

- Working with Periodic Functions (WPER) describes working with the functions you can include in your periodic processing.
- Working with Periodic Processes (WPPR) describes how to create, change, delete or display a periodic process.
- Executing Periodic Processes (EPRO) describes how to set up and execute a periodic process.
- Working with Periodic Process History (WPHS) presents the screens you use to review periodic process history.
- Purge Periodic Process History (MPPR) describes how to purge periodic process history in a completed status for all Order Administration companies prior to a specified date.

- Printing the Tax Jurisdiction Report (PTXJ) describes how to run this report and presents a sample.
- Releasing Orders from Time Hold describes the RLSTIME periodic function.
- Working with the Marketing Download Extract describes how to download order, customer, source code, and vendor information from Order Administration to the DMT system.
- Using the Financial Data Interface describes how to extract information to the Financial Sales Download table.

Working with Periodic Functions (WPER)

Periodic functions are jobs that you need to run periodically, usually on a daily, monthly, or yearly basis. Periodic functions include reports listing or summarizing activity in a particular area of your business, reports providing current status information on your business, periodic resets, and aging operations.

Assign certain functions to your daily, monthly and yearly processing; a list of these functions appears in this topic. You can define your own programs and queues as periodic functions as well.

You use Working with Periodic Processes (WPPR) to define a group of periodic functions to run together within a periodic process and to schedule when the system executes the process. You cannot run a periodic function by itself.

> **Note:**
>
> Periodic functions and processes are not restricted by company; when you create a periodic function or process, it is defined across all companies.

For more information: See Periodic Functions Available to Schedule for a listing of functions.

In this topic:

- Work with Periodic Functions Screen
- Create Periodic Function Screen

Work with Periodic Functions Screen

How to display this screen: Enter WPER in the Fast path field at the top of any menu, or select Work with Periodic Functions from a menu.

Field	Description
Function	The name of the periodic function. Alphanumeric, 7 positions; display-only.
Description	The description of the periodic function. Alphanumeric, 70 positions; optional.

Field	Description
Applic (Application area code)	The area of Order Administration (for example, Customer Service) where this function belongs. Use application areas to categorize similar system control values, secured features, and menu options as well as periodic functions. Alphanumeric, 3 positions; optional.
System	Indicates whether the periodic function is a system-level function, which was delivered with the software and cannot be changed or deleted. Valid values are: • Yes = This is a system-level function. • No = This is not a system-level function. Optional.

Screen Option	Procedure
Change a periodic function	Select Change for the function to advance to the Change Periodic Function Screen. You can change any information on this screen except for the function name. See the Create Periodic Function Screen for field descriptions.
Delete a periodic function	Select Delete for a function to delete it. **Note:** You cannot delete a function that is assigned to a periodic process. You must first remove the periodic function from the process before you can delete it.
Display a periodic function	Select Display for a function to advance to the Display Periodic Function Screen. You cannot change any information. See the Create Periodic Function Screen for field descriptions.
Create a new periodic function	Select Create to advance to the Create Periodic Function Screen.

Create Periodic Function Screen

Purpose: Use this screen to create a function to include in periodic processing.

How to display this screen: Select Create at the Work with Periodic Functions Screen.

Field	Description
Function	The name of the periodic function. You must define a function at this screen before you can assign it to a periodic process. Alphanumeric, 7 positions. Create screen: required. Change screen: display-only.
Description	The description of the periodic function. Alphanumeric, 70 positions; optional.

Field	Description
Company parameter	Select this field to indicate that a company parameter is required to execute the periodic process containing this periodic function. If you assign a function with this field selected to a periodic process, it updates the Company parameter field for the periodic process to selected, and you need to enter a company code at the First Execute Periodic Process Screen (Setting Parameters). Company codes are defined in and validated against the Company table.
Appl area (Application area code)	The area of Order Administration (for example, Customer Service) where this function belongs. Use application areas to categorize similar system control values, secured features, and menu options as well as periodic functions. Alphanumeric, 3 positions; required.
Program name	The name of the program to be called by the periodic function. Used only if no Class name is defined. You cannot define both a Program name and a Class name. Alphanumeric, 10 positions; required.
Class name	The name of the class to be called by the periodic function. Used only if no Program name is defined. You cannot defined both a Program name and a Class name. Currently, the Class name is used only for the following periodic functions: • BILLUPD periodic function (batch billing update): oracle.retail.oms.services.job.functions.BillingUpdateBatchJob • SCHDDEP periodic function (schedule deposits): oracle.retail.oms.services.job.functions.DepositBatchSingleRunJob Alphanumeric, 63 positions; required if no Program name is defined."
Parameter	A parameter required to execute the periodic function. See Periodic Functions Available to Schedule to review which periodic functions allow you to define an additional parameter. Alphanumeric, 256 positions; optional.

Working with Periodic Processes (WPPR)

Periodic processes are jobs consisting of one or more periodic functions that run on a daily, weekly, monthly, or yearly basis.

See Periodic Functions Available to Schedule for examples of functions to assign to your daily, weekly, monthly and yearly processing.

Note:

Periodic functions and processes are not restricted by company; when you create a periodic function or process, it is defined across all companies.

Scheduling jobs: See Scheduling Jobs for information on how to schedule periodic processes.

Execute process through web service: You can also use the CWProcessIn message or the ProcessIn message to start a periodic process. See *Using the*

CWProcessIn Message to Start a Periodic Process or *Using the ProcessIn REST Message to Start a Periodic Process* for more information.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Options: You can execute a periodic process or display its history from the Work with Periodic Process screen or through separate menu options. See Executing Periodic Processes (EPRO), for information on running a periodic process and Working with Periodic Process History (WPHS), for information on displaying the past records of a periodic process.

Generating a job notification: You can generate an outbound web service message to notify an external system when a periodic process is complete. See *Using the Job Notification Outbound REST Message* for more information.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Purging history: When a process completes, it automatically deletes any Process History Header records, and their associated Process History Detail records, for that process that are in completed or canceled status, and if the date for the detail records is older than the Periodic Process History Purge Days (L77). See that system control value for more information.

In this topic:

- Work with Periodic Processes Screen
- Create Periodic Process Screen
- Work with Process Assignments Screen (Assigning Functions to a Periodic Process)

Work with Periodic Processes Screen

How to display this screen: Enter WPPR in the Fast path field at the top of any menu, or select Work with Periodic Process from a menu.

Field	Description
Process	The name of the periodic process. Alphanumeric, 10 positions; optional.
Description	The description of the periodic process. Alphanumeric, 70 positions; optional.
Appl Area (Application area)	The area of Order Administration (for example, Order Entry) where this process belongs. Alphanumeric, 3 positions; optional.
Type (Periodic process type list)	Indicates the time period of the periodic process. Processes run on a daily, weekly, monthly or yearly basis. Informational-only. Valid values are: • Annually • Daily • Monthly • Weekly Optional.

Field	Description
Sys opt (System operation)	Indicates whether the periodic process is a system-level process that cannot be changed or deleted. Valid values are: • Yes = this is a system-level process • No = this is not a system-level process

Screen Option	Procedure
Change a periodic process	Select Change for the process to advance to the Change Periodic Process Screen. You can change any information on this screen except the process name and company parameter. See the Create Periodic Process Screen for field descriptions.
Delete a periodic process	Select Delete for a process to delete it. **Note:** You cannot delete a periodic process if process history exists. You must first delete the history before you can delete the periodic process.
Display a periodic process	Select Display for a process to advance to the Display Periodic Process Screen. You cannot change any information. See Create Periodic Process Screen for field descriptions.
Display the periodic functions within the periodic process	Select Functions for a process to advance to the Work with Process Assignments Screen (Assigning Functions to a Periodic Process).
Run a periodic process	Select Execute for a process to advance to the First Execute Periodic Process Screen (Setting Parameters).
Display the history of a periodic process	Select History for a process to advance to the Work with Process History Screen.
Create a new periodic process	Select Create to advance to the Create Periodic Process Screen.

Create Periodic Process Screen

Purpose: Use this screen to create a periodic process.

To assign functions to the periodic process, return to the Work with Periodic Process screen and select Functions for the process. See Work with Process Assignments Screen (Assigning Functions to a Periodic Process).

How to display this screen: Select Create at the Work with Periodic Processes Screen.

Field	Description
Process	The name of the periodic process. Alphanumeric, 10 positions. Create screen: required. Change screen: display-only.
Description	The description of the periodic process. Alphanumeric, 70 positions; required.
Type (Periodic process type list)	Indicates the time period of the periodic process. Processes can be run on a daily, weekly, monthly or yearly basis. Informational-only. Valid values are: • Annually • Daily • Monthly • Weekly Optional.
Company parameter?	This flag is included on the Change Periodic Process Screen and the Display Periodic Process Screen, and indicates whether any of the periodic functions added through the Work with Process Assignments Screen (Assigning Functions to a Periodic Process) require a company parameter. Possible settings are: • Selected = One or more of the periodic functions has the Company parameter selected • Unselected = None of the periodic functions has the Company parameter selected If this value is selected, the Company field at the First Execute Periodic Process Screen (Setting Parameters) is enterable and required; otherwise, the field is display-only.
Appl area	The area of Order Administration (for example, Order Entry) where this process belongs. Alphanumeric, 3 positions; required.
Job queue	The job queue where the system submits the periodic process. The job queue defaults to QBATCH. Alphanumeric, 10 positions; required.

Work with Process Assignments Screen (Assigning Functions to a Periodic Process)

Purpose: Use this screen to assign periodic functions to a periodic process.

How to display this screen: Select Functions for a process at the Work with Periodic Processes Screen

Field	Description
Process	The name of the periodic process. Alphanumeric, 10 positions; display-only.
Description	The description of the periodic process. Alphanumeric, 70 positions; display-only.

Field	Description
Type	Indicates the time period of the periodic process. Processes can be run on a daily, weekly, monthly or yearly basis. Informational-only. • Annually • Daily • Monthly • Weekly Alphanumeric, display-only.
Appl area	The area of Order Administration (for example, Order Entry) where this application belongs. Alphanumeric, 3 positions; display-only.
Seq # (Sequence Number)	The position of the function within the periodic process. This number indicates the order in which the system executes the functions within the process. Numeric, 3 positions; required.
Function	The name of the periodic function. Periodic functions are validated against the Periodic Function table. Alphanumeric, 7 positions; required.
Description	The description of the periodic function. Alphanumeric, 70 positions; displays when correct information is entered in the required fields.
Select	Indicates whether to include the periodic function in the next execution. Valid values are: • Yes = Include this function. • No = Do not include this function. Required.

Screen Option	Procedure
Remove a periodic function from a periodic process	Select Delete for a periodic function to advance to the Confirm Delete window. Select Delete to remove the periodic function from the periodic process; otherwise, select Exit to cancel.

Executing Periodic Processes (EPRO)

Purpose: Use the Executing Periodic Processes function to select and set up the parameters of a process for its execution.

The parameters of the process contain:

- the company where the execution takes place
- the schedule parameters of when the system executes the periodic process

> **Note:**
>
> Periodic functions and processes are not restricted by company; when you create a periodic function or process, it is accessible to run across all companies.

In this topic:

- Select Periodic Process to Execute Screen
- First Execute Periodic Process Screen (Setting Parameters)
  - Periodic Process Scheduling Examples
- Second Execute Periodic Process Screen (Selecting Functions)

Other ways to submit periodic processes: You can also execute a periodic process through:

- Working with Periodic Processes (WPPR)
- *Using the CWProcessIn Message to Start a Periodic Process*
- *Using the ProcessIn REST Message to Start a Periodic Process*

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Select Periodic Process to Execute Screen

How to display this screen: Enter EPRO in the Fast path field at the top of any menu, or select Execute Periodic Process from a menu.

Field	Description
Process	The name of the periodic process you wish to run. Alphanumeric, 10 positions; required.

Completing this screen:

1. Enter the name of a periodic process in the Process field and select OK.
2. You advance to the First Execute Periodic Process Screen (Setting Parameters). At this screen, you can define the schedule of when the system executes the periodic process.

First Execute Periodic Process Screen (Setting Parameters)

Purpose: Use this screen to set up the parameters of the process for execution.

How to display this screen:

- Enter the process name in the Process field on the Select Periodic Process to Execute Screen.
- Select Execute for a periodic process on the Work with Periodic Processes Screen.

Field	Description
Process	The name of the periodic process. Alphanumeric, 10 positions; display-only.

Field	Description
Description (unlabeled field to the right of the Process field)	The description of the periodic process. Alphanumeric, 30 positions; display-only.
Application area	The area of Order Administration, for example Order Entry, where this process belongs. Alphanumeric, 3 positions; display-only.
Type description (unlabeled field below the process description)	Unlabeled field underneath the *Description* field. Indicates the time period of the periodic process. Processes run on a daily, weekly, monthly or yearly basis. Informational-only. Valid values are: • Annually • Daily • Monthly • Weekly Display-only.
Company	The company where the process runs. You need to enter a company code even for periodic processes that run for all companies, for example, starting or stopping asyncs. The system ignores the company parameter for periodic functions in the process that do not require company. Alphanumeric, 3 positions; required.
Job queue	The job queue where the system submits the periodic process. The job queue defaults to *JOBD, indicating the system submits the periodic process to QBATCH. **Note:** If you wish to run the job in a designated queue, define that queue. Use the PICKGEN job queue when scheduling pick slip generation or deposits. Alphanumeric, 10 positions; required.
Scheduling	See Scheduling Jobs for more information on how to schedule a job.

Field	Description
Frequency	Indicates how often the system executes the periodic process. Valid values are: • Now (default) = Execute the periodic process immediately. **Note:** If you select Now, the system does not add the periodic process to the Job Scheduler. • Once = Schedule the periodic process to run once, and only once, at a specified date and time in the future. You must specify the Date and Time to execute the process. The system validates that the Date is greater than or equal to today. If you enter today's date, the system validates that the Time is greater than or equal to the current time. • Daily = Schedule the periodic process to run once a day at a specified time. You must specify the Time to execute the process. • Weekly = Schedule the periodic process to run once a week, at a specified time, on a specified day of the week. You must specify the Time and Day of week to execute the process. • Monthly = Schedule the periodic process to run once a month on a specified day and time. You must specify the Time and Day of month to execute the process. • Month Start = Schedule the periodic process to run once a month on the first day of the month at a specified time. You must specify the Time to execute the process. • Month End = Schedule the periodic process to run once a month on the last day of the month at a specified time. You must specify the Time to execute the process. Alphanumeric, required.
Date	The date when the system executes the periodic process. This field is required if you select Once for the Frequency. You can enter a date that is greater than or equal to today's date. If you enter today's date, the Time must be greater than the current time. Numeric, 6 positions (in user date format); required if Frequency is Once.

Field	Description
Time	The time, in military format, when the system executes the periodic process. If you enter today's Date, the time must be greater than the current time. This field is required if you select Once, Daily, Weekly, Monthly, Month Start, or Month End for the Frequency. A time of 000000 indicates to run the process at midnight. Numeric, 6 position (HHMMSS, military format); required unless Frequency is Now.
Day of week	The day of the week when the system executes the periodic process. This field is required if you select Weekly for the Frequency. Valid values are: • Blank = No day specified. • Sunday • Monday • Tuesday • Wednesday • Thursday • Friday • Saturday Alphanumeric, 10 positions; required if Frequency is Weekly.
Day of month	The day of the month when the system executes the periodic process. This field is required if you select Monthly for the Frequency. Valid values are 0 - 31. **Note:** If you enter 31 as the day of the month, the system will only execute the periodic process on those months that contain 31 as a valid date. If you wish to execute the periodic process at the end of each month, select the MONTH END option for the Frequency. Numeric, required if Frequency is Monthly.

Completing this screen:

#	Step
1.	Enter a valid company code in the Company field.
2.	Enter a valid job queue in the Job queue field. If you leave this field set to *JOBQ, the system submits the periodic process to QBATCH.

#	Step
3.	Select when to execute the periodic process using the Frequency field. See Periodic Process Scheduling Examples for examples of how to schedule a periodic process. • Now = Execute the periodic process immediately. • Once = Schedule the periodic process to run once, and only once, at a specified date and time in the future. • Daily = Schedule the periodic process to run once a day at a specified time. • Weekly = Schedule the periodic process to run once a week at a specified time. • Monthly = Schedule the periodic process to run once a month on a specified day and time. • Month Start = Schedule the periodic process to run once a month on the first day of the month at a specified time. • Month End = Schedule the periodic process to run once a month on the last day of the month at a specified time.
4.	The Frequency field indicates which Scheduling fields are required, based on the frequency option you select: • Now = You do not need to define additional parameters. • Once = You must specify the Date and Time to execute the process. The system validates that the Date is greater than or equal to today. If you enter today's date, the system validates that the Time is greater than or equal to the current time. • Daily = You must specify the Time to execute the process. • Weekly = You must specify the Time and Day of week to execute the process. • Monthly = You must specify the Time and Day of month to execute the process. • Month Start = You must specify the Time to execute the process. • Month End = You must specify the Time to execute the process.
5.	If you enter a value in any of the Scheduling fields that is not required for the frequency you selected, the system ignores those entries when executing the periodic process. For example, if you select Now for the Frequency and also enter a value in the Weekly field, the system executes the periodic process immediately and ignores the value in the Weekly field.
6.	Select OK to advance to the Second Execute Periodic Process Screen (Selecting Functions). At this screen, you can select the functions within the process to execute. • If the periodic process is scheduled to execute immediately (you selected Now in the Frequency field), select Execute or Execute & Save Overrides to execute the periodic process and optionally, save the job parameters. • If the periodic process is scheduled to execute at a specified time in the future (you selected a value other than Now in the Frequency field), select Schedule. The system adds the periodic process to the job scheduler and does not execute the periodic process until the specified time is reached. See Scheduling Jobs.

Periodic Process Scheduling Examples

The table below provides examples of how to define a schedule for a periodic process.

Schedule	Procedure
Execute the periodic process immediately.	Select Now for the Frequency. The system submits the job to the specified job queue for the user that executed the periodic process. **Note:** Because the process is executed immediately, the system does not add the periodic process to the job scheduler.
Execute the periodic process tonight at 7 PM. Do not run the process any other night. Example: End asyncs tonight at 7 PM.	• Select Once for the Frequency. • Enter the current date in the Date field. • Enter 190000 (7 PM in military time) in the Time field.
Execute the periodic process today at 3 PM and tomorrow at 8 AM. Do not run the process at any other time. Example: Run a status report today at 3 PM and again tomorrow at 8 AM.	**Note:** You need to create more than one schedule for the periodic process. First Schedule: • Select Once for the Frequency. • Enter the current date in the Date field. • Enter 150000 in the Time field. Second Schedule: • Select Once for the Frequency. • Enter tomorrow's date in the Date field. • Enter 080000 in the Time field.
Execute the periodic process every morning at 6 AM. Example: Start asyncs every morning at 6 AM.	• Select Daily for the Frequency. • Enter 060000 in the Time field.

<table>
<tr><th>Schedule</th><th>Procedure</th></tr>
<tr><td>Execute the periodic process every morning, except Saturdays and Sundays, at 6 AM.
Example: Start the asyncs every morning during the work week at 6 AM.</td><td>Note: You need to create more than one schedule for the periodic process.
First Schedule:
• Select Weekly for the Frequency.
• Select Monday for the Day of week.
• Enter 060000 in the Time field.
Second Schedule:
• Select Weekly for the Frequency.
• Select Tuesday for the Day of week.
• Enter 060000 in the Time field.
Third Schedule:
• Select Weekly for the Frequency.
• Select Wednesday for the Day of week.
• Enter 060000 in the Time field.
Fourth Schedule:
• Select Weekly for the Frequency.
• Select Thursday for the Day of week.
• Enter 060000 in the Time field.
Fifth Schedule:
• Select Weekly for the Frequency.
• Select Friday for the Day of week.
• Enter 060000 in the Time field.</td></tr>
<tr><td>Run the periodic process every week on Mondays at 10 AM.
Example: Run the weekly status reports every Monday at 10 AM.</td><td>• Select Weekly for the Frequency.
• Select Monday for the Day of week.
• Enter 100000 in the Time field.</td></tr>
<tr><td>Run the periodic process every month on the 25th day of every month at 7 PM.
Example: Run the monthly status reports on the 25th day of every month at 7 PM.</td><td>• Select Monthly for the Frequency.
• Enter 25 in the Day of month field.
• Enter 190000 in the Time field.</td></tr>
<tr><td>Run the periodic process on the first day of every month at 8 AM.
Example: Run the monthly status report on the first day of every month at 8 AM.</td><td>• Select Month Start for the Frequency.
• Enter 080000 in the Time field.</td></tr>
</table>

Schedule	Procedure
Run the periodic process on the last day of every month at 9 PM. Example: Run the monthly status report on the last day of every month at 9 PM.	• Select Month End for the Frequency. • Enter 210000 in the Time field.

Second Execute Periodic Process Screen (Selecting Functions)

Purpose: Use this screen to select the functions within the process you wish to run.

How to display this screen: Complete all the necessary fields on the first First Execute Periodic Process Screen (Setting Parameters).

Field	Description
Process	The name of the periodic process. Alphanumeric, 10 positions; display-only.
Description (Unlabeled field to the right of the Process field)	The description of the periodic process. Alphanumeric, 30 positions; display-only.
Application area	The area of Order Administration, (for example, Order Entry) where this process belongs. Alphanumeric, 3 positions; display-only.
Type description (unlabeled field below the process description)	Indicates the time period of a periodic process. Processes run on a daily, weekly, monthly or yearly basis. Informational-only. Valid values are: • Annually • Daily • Monthly • Weekly Display-only.
Seq#	The position of the function within the periodic process. This number indicates the order in which the system executes the functions within the process. Alphanumeric, 1 position; display-only.
Function	The name of the periodic function. Alphanumeric, 7 positions; display only.
Description	The description of the periodic function. Alphanumeric, 70 positions; display only.
Select	Indicates whether to include the periodic function in the execution. Valid values are: • Yes = Include this function. • No = Do not include this function. Required.

Screen Option	Procedure
Schedule the periodic process and save the job options	Select Schedule. This option only displays if the periodic process is scheduled to run in the future (you selected any value other than Now in the Frequency field). The system adds the periodic process to the job scheduler and does not execute the periodic process until the specified time is reached. See Scheduling Jobs.
Execute the periodic process and do not save the job options	Select Execute. This option only displays if the periodic process is scheduled to run immediately (you selected Now in the Frequency field). Because the process runs immediately, the system does not add the process to the job scheduler.
Execute the periodic process and save the job options	Select Execute & Save Overrides. This option only displays if the periodic process is scheduled to run immediately (you selected Now in the Frequency field). Because the process runs immediately, the system does not add the process to the job scheduler.

Working with Periodic Process History (WPHS)

Purpose: Use this function to review the processing information of a periodic process.

The records of a process contain:

- the initiation date and time
- the activation date and time
- the process date and time
- the list of functions that make up the process
- the status of each function

Example: If a function within the process does not run as planned, the status function error is displayed next to the function.

> **Note:**
>
> Periodic functions and processes are not restricted by company; when you create a periodic function or process, it is defined across all companies.

In this topic:

- Work with Process History Screen
- Display Process History Details Screen

For more information:

- creating periodic functions: Working with Periodic Functions (WPER)

- creating a periodic process and assigning functions to a process: Working with Periodic Processes (WPPR)
- running a process: Executing Periodic Processes (EPRO)
- a list of functions to include in your periodic processing and reviewing the periodic process job schedule: Scheduling Jobs
- purging periodic process history in a completed status for all Order Administration companies prior to a specified date: Purge Periodic Process History (MPPR)
- specifying the default number of days old a history record should be before it is eligible for purge: Periodic Process History Purge Days (L77)

Work with Process History Screen

How to display this screen:

- Enter WPHS in the Fast path field at the top of any menu
- Select Work with Process History from a menu
- Select History for a periodic process on the Work with Process History Screen

The screen displays process history in alphanumeric order by process name, and in LIFO (last in, first out, or most recent to oldest) sequence for each process.

Field	Description
Process	The name of the periodic process. When you advance to the screen from the Work with Process History Screen, only the process you select will display. Alphanumeric, 10 positions; optional (display-only from Work with Periodic Process screen).
Description	The description of the periodic process. Alphanumeric, 30 positions; display-only.
Status	The stage of the periodic process. Valid values are: • Active • Canceled • Completed • Submitted Optional (display-only from Work with Periodic Process screen).
Init date (Initiation date)	The date the periodic process was queued for processing. Numeric, 6 positions (in user date format); optional (display-only from Work with Periodic Process screen).
Init time (Initiation time)	The time the periodic process was queued for processing. Numeric, 6 positions (HHMMSS format); optional (display-only from Work with Periodic Process screen).

Screen Option	Procedure
Display process history details	Select Details for the process to advance to the Display Process History Details Screen.

Screen Option	Procedure
Update the status of a periodic process history record to completed	Select Mark completed for the process to update the status to Completed.

Display Process History Details Screen

Purpose: Use this screen to display the details of periodic process history.

How to display this screen: Select Details for a periodic process at the Work with Process History Screen.

Field	Description
Process	The name of the periodic process displayed. Alphanumeric, 10 positions; display-only.
Description	The description of the periodic process. Alphanumeric, 30 positions; display-only.
Status	The stage of the periodic process. Valid values are: • Active • Canceled • Completed • Submitted Display-only.
Initiation date	The date when the periodic process was queued for processing. Numeric, 6 positions (in user date format); display-only.
Activation date	The date the periodic process began running, or was scheduled to begin running on the system. Valid values are: *CURRENT = the current day *MONTHSTR = the beginning of the month *MONTHEND = the end of the month *MON-*SUN = specific day of the week Alphanumeric, 10 positions (in user date format); display-only.
Initiation time	The time the periodic process was queued for processing. Numeric, 6 positions (HHMMSS format); display-only.
Activation time	The time the periodic process was actively running on the system. Valid values are: *CURRENT = the present time Alphanumeric, 10 positions (HHMMSS format); display-only.
For each periodic function included in the process:	
Date	The date the periodic function began processing on the system. Numeric, 6 positions (in user date format); optional.
Time	The time the periodic function began processing on the system. Numeric, 6 positions (HHMMSS format); optional.

Field	Description
Function	The name of the periodic function. Alphanumeric, 7 positions; display-only.
Message	Indicates the status of the job. Alphanumeric, 7 positions; display-only.

Purge Periodic Process History (MPPR)

Purpose: Use this menu option to delete all Completed (P) or Canceled (C) Process History Header records, and their associated Process History Detail records, for all processes in all companies if the date for the detail record is older than the Purge history prior to initiate date specified.

If there are any Process History Detail records that are not associated with a Process History Header record, these detail records are also deleted.

Additional way to purge history: After a periodic process runs, it automatically purges history records that are older than the Periodic Process History Purge Days (L77). This automatic purge applies only to records for that periodic process. See the Periodic Process History Purge Days (L77) system control value for more information.

Determining the purge days across companies: The setting of the Purge history prior to initiate date defaults from the Periodic Process History Purge Days (L77) system control value. Because the Purge Periodic Process History option runs across all companies, it searches for a Periodic Process History Purge Days (L77) setting across companies numerically and uses the first system control value setting that is not zero. This search occurs regardless of the current company you are working in at the time you select the Purge Periodic Process History option.

Example: You are working in company 1, where the Periodic Process History Purge Days (L77) system control value is set to zero. In company 2, the system control value is set to 45. The purge function defaults a purge date that is 45 days earlier than the current date.

Reviewing history: You can review periodic process history using the Working with Periodic Process History (WPHS) menu option.

Purge Process History Screen

Use this screen to delete periodic process history in a completed or canceled status for all Order Administration companies prior to a specified date.

How to display this screen: Enter MPPR in the Fast path field or select Purge Periodic Process History from a menu.

Field	Description
Purge history detail prior to date	The system defaults this date by subtracting the Periodic Process History Purge Days (L77) from the current date, but you can override this default. See above for a discussion. Numeric, 6 positions (in user date format); required.

Completing this screen:

1. Optionally, override the Purge history prior to initiate date. The system calculates the default date by subtracting the Periodic Process History Purge Days (L77) from the current date, but you can override the default. See above for a discussion.
2. Select OK to validate your entry.
3. Select Accept to advance to the Confirm Accept window. Select OK to submit the PHST_PURGE job; otherwise, select Exit to cancel.

The PHST_PURGE job:

- deletes records in the Process History Detail table whose PHH status is P (Completed) or C (Canceled), and whose PHH initiation date is earlier than the Purge history prior to initiate date.
- deletes records in the Process History Header table which, after the action detailed above, no longer associate with any Process History Detail records.
- deletes any additional Process History Detail records, for all companies, that are not associated with a Process History Header record.

Printing the Tax Jurisdiction Report (PTXJ)

Purpose: Run the Tax Jurisdiction Report to identify the dollars collected and credited for each tax jurisdiction for a specified invoice date range.

You can use the Working with Tax Jurisdiction (WTXJ) menu option to define tax jurisdictions. Tax Jurisdictions define postal code ranges for an area where a special tax structure exists. For example, tax jurisdictions exist for some counties in New York and New Jersey. Different tax rates apply for these areas, rather than the usual tax rate for the postal code or SCF. In addition, you can define tax jurisdictions within the United States only.

To generate the report:

#	Step
1.	At the Print Tax Jurisdiction Report Screen, enter the invoice date range you wish to use to generate the Tax Jurisdiction Report.
2.	Select OK to validate your entries and then select Print Report.
3.	The system submits the TAX_JUR job to generate the Tax Jurisdiction Report.

Determining the invoices to include on the report: The system uses the invoice date range you define on the Print Tax Jurisdiction Report Screen and the Invoice date in the Invoice Ship To table to determine which invoices to include on the report.

Determining the tax jurisdiction: The system uses the Invoice Address table to determine the ship to customer for the invoice. The system then compares the postal code defined for the ship to customer to the tax jurisdictions defined in Working with Tax Jurisdiction (WTXJ) to determine which tax jurisdiction is associated with the invoice.

UNKNOWN tax jurisdiction: Any tax amounts that are not associated with a tax jurisdiction print on the report under an UNKNOWN category.

Determining the tax: The system uses the Tax in the Invoice Ship To table to determine the tax to include on the report. Positive tax amounts accumulate in the Amount charged field on the report; negative tax amounts accumulate in the Amount credited field on the report. **Note:** The Tax field includes regular tax, GST, and PST amounts. The Tax field does not include VAT amounts.

Capture invoice address: In order to print the Tax Jurisdiction report, the Capture Addresses for Invoice (J24) system control value must be selected, indicating the system creates a record of the billing and shipping address in the Invoice Address table each time you bill a shipment.

Print Tax Jurisdiction Report Screen

Use this screen to specify the invoice date range to use to generate the Tax Jurisdiction Report and to submit the report.

How to display this screen: Enter PTXJ in the Fast path field at the top of any menu or select the Print Tax Jurisdiction report option from a menu.

Field	Description
Start date	The start date for which you want to run the Tax Jurisdiction Report. The system uses the Invoice Ship To table to determine which invoices to include in the Tax Jurisdiction report. An error message displays if the Start date is a future date: Date must be on or before today's date. Numeric, 6 positions (in user date format); required.
End date	The end date for which you want to run the Tax Jurisdiction Report. The system uses the Invoice Ship To table to determine which invoices to include in the Tax Jurisdiction report. An error message displays if the end date is a future date: Date must be on or before today's date. An error message displays if the End date is earlier than the Start date: Starting date cannot be greater than Ending Date. Numeric, 6 positions (in user date format); required.

Using the System Utilities

Topics in this part: The following topics describe the utilities available in the system that are typically used only by the System Administrator.

- Working with Default Options (WDFT) describes how to work with predefined field or program defaults.
- Consolidating Order Billing History (MOBH) describes how to consolidate order billing history.
- Working with Inventory Resets describes the options available to reset inventory levels when they become out of synch.
- Reset Allocation Quantities (MRPC) describes how to reset the printed quantities for orders.
- Reset Reserve Quantity (MRQR) describes how to reset the reserved quantity of items in inventory.
- Reset Back Order Quantity (MRBO) describes how to reset the backorder quantity of items in inventory.
- Reset Item Warehouse Quantity On Hand (MRIW) describes how to reset the quantity on-hand for each Item Warehouse record based on the total quantities on-hand.

- Reset SKU Open Order Quantity (MRSO) describes how to reset the fields in the SKU table based on the current open orders for the SKU.
- Unlocking a Stranded Order or Batch (MULO) describes how to unlock an order or batch that became locked during processing or maintenance.
- Resetting the Order Billing History Table (ROBH) describes how to reset the Order Billing History table based on the records in the Order Detail table.
- Resetting Customer Sold To Amount On Order (RONO) describes how to reset the On order amount field in the Customer Sold To Order History file so that it matches the amount of any existing open orders for the customer.
- Unlock Purchase Order (MUPO) describes how to reset locked purchase orders and reset the on-order quantities for Item Warehouse records.
- Work with File Uploads (WUPL) describes how to upload a file to a specified table in the Order Administration database.

Working with Default Options (WDFT)

Purpose: The Work with Default Options menu option lets you set up values for the system to retrieve automatically. For example, you might define default settings for the system to use when running a report or creating records in a table through a batch process. You can also define default values to pre-fill fields each time you advance to a particular screen.

> **Note:**
>
> The system will use the settings in the Default Options table only if the program is set up to do so.

In this topic:

- Work with Program/Field Default Screen
- Create Program/Field Default Screen

Work with Program/Field Default Screen

Purpose: Use this screen to review the settings of default fields.

How to display this screen: Enter WDFT in the Fast path field at the top of any menu, or select Work with Default Options from a menu.

Field	Description
Program	The program that uses the default setting. Alphanumeric, 10 positions; optional.
Field name	The name of the field to receive the default setting. Alphanumeric, 25 positions; optional.
Default	The default setting for the field to take. The attributes of the default vary, depending on the type of field. See Create Program/Field Default Screen.

Screen Option	Procedure
Create a new default	Select Create to advance to the Create Program/Field Default Screen.
Change a default	Select Change for a default option to advance to the Change Program/Field Default Screen. You can change only the field default. See the Create Program/Field Default Screen for field descriptions.
Delete a default	Select Delete for a default option to delete it.
Display a default	Select Display for a default option to advance to the Display Program/Field Default Screen. You cannot change any information at this screen. See the Create Program/Field Default Screen for field descriptions.

Create Program/Field Default Screen

Purpose: Use this screen to create a new default option.

> **Important:**
>
> The system does not validate that your entries on this screen are correct or appropriate. Also, your entries must be exact in order for the system to use the default value settings you create. For these reasons, you must take extreme care in setting up default options on this screen.

How to display this screen: Select Create at the Work with Program/Field Default Screen.

Field	Description
Program	The program that will use the default option setting. Alphanumeric, 10 positions. Create screen: required Change screen: display-only.
Field	The name of the field that will take the default value you enter below. Alphanumeric, 25 positions; required.
Change screen: the following fields are display-only. Create screen: only one of the following fields is also required:	
Status	Valid values are: Selected Unselected
Code	Alphanumeric, 10 positions.
Dollar	Numeric, 13 positions with a 2-place decimal.

Field	Description
Percentage	Numeric, 5 positions with a 2-place decimal.
Weight	Numeric, 7 positions with a 3-place decimal.
Sequence number	Numeric, 6 positions.
Number	Numeric, 7 positions.

Completing this screen: Complete the Program and Field fields and one of the remaining fields.

Consolidating Order Billing History (MOBH)

Purpose: Use the Consolidate Order Billing History menu option to consolidate records in the Order Billing History table up to a given date, to save space and eliminate unneeded information. You can “roll up” or consolidate records into summary records by indicating which key fields you would like to retain, and which you would like to blank out.

Example: You want to retain separate records by sold-to customer, but not ship-to customer. The total units and quantities of the ship-to customer records for each sold-to customer will be added or netted together, and then the individual ship-to customer records will be deleted. The resulting consolidated sold-to records will have the ship-to number fields set to zero.

The system flags each consolidated record in the table. You can consolidate any records only once.

When to run consolidation: You should run the consolidation at night, when there will not be any other activity that might update the Order Billing History table.

Reviewing consolidated records: When you review customer history through Work with Customers (fast path = WCST), any consolidated records are indicated as follows:

- Consolidated items are flagged at the Customer Sold To Item History Screen (available by selecting Item History at a Create/Change/Display Customer screen, or selecting Item History for a customer at a selection screen)
- The range of dates included in a consolidated record is indicated at the Display Customer Order History Screen (available by selecting Order History at a Create/Change/Display Customer screen, or selecting Order History for a customer at a selection screen)
- The range of dates included in a consolidated record is indicated at the Order Billing History Detail Screen (available by selecting Display for an item at the Customer Sold To Item History screen or the Customer Sold To Order History screen)

Additional information: Working with Merge/Purge Sold-to Names (MMCS) ignores consolidated records that do not include the sold-to customer number.

In this topic:

- Consolidate Order Billing History Screen
- Order Billing History Consolidation Report

Consolidate Order Billing History Screen

Each flagged option on this screen represents a key field in the Order Billing History table. In order to save separate order billing history records by a field, you must select it. For example, select the Customer flag to save separate order billing history for each sold-to customers; otherwise, the history will be consolidated across all sold-to customers in your company.

You must select at least one field.

How to display this screen: Enter MOBH in the Fast path field at the top of any menu or select Consolidate Order Billing History from a menu.

> **Note:**
>
> The system stores your entries on this screen in the Default Options table, to save data entry if you run the consolidation program periodically. The first time you use this screen, each yes/no flag will default to unselected, and the date field will be blank.

Field	Description
Consolidate transactions up to date	Enter the last date for which order billing history should be consolidated. All order billing history records from this date or earlier that meet the selection criteria will be consolidated. Numeric, 6 positions (in user date format); required.
Consolidate by:	
Customer	This field indicates whether to consolidate order billing history by number of the sold-to customer on the order. Valid values are: • Selected = Retain separate order billing history for each sold-to customer. • Unselected = Consolidate customer sold-to order billing history. See Creating and Updating Sold-to Customers (WCST).
Ship to	This field indicates whether to consolidate order billing history by customer ship-to number. Valid values are: • Selected = Retain separate order billing history for each ship-to customer. You must also select the *Customer* field, above. • Unselected = Consolidate customer ship-to order billing history. See Creating and Updating Sold-to Customers (WCST).
Item	This field indicates whether to consolidate order billing history by item. Valid values are: • Selected = Retain separate order billing history for each item. • Unselected = Consolidate customer order billing history for all items. See Performing Initial Item Entry (MITM).

Field	Description
SKU	This field indicates whether to consolidate order billing history by SKU. Valid values are: • Selected = Retain separate order billing history for each SKU. You must also select the Item field. • Unselected = Consolidate customer order billing history for SKUs. See Performing Initial Item Entry (MITM).
Ship via	This field indicates whether to consolidate order billing history by ship via. Valid values are: • Selected = Retain separate order billing history for each ship via. • Unselected = Consolidate customer order billing history for all ship vias. See Working with Ship Via Codes (WVIA).
Source	This field indicates whether to consolidate order billing history by source code. Valid values are: • Selected = Retain separate order billing history for each source code. • Unselected = Consolidate customer order billing history for all items. See Working with Source Codes (WSRC).
Offer	This field indicates whether to consolidate order billing history by item. Valid values are: • Selected = Retain separate order billing history for each offer. • Unselected = Consolidate customer order billing history for all offers. See Working with Offers (WOFR).
Salesman	This field indicates whether to consolidate order billing history by salesman. Valid values are: • Selected = Retain separate order billing history for each salesman. • Unselected = Consolidate customer order billing history for all salesmen. See Working with Sales Representatives (WSLS).
Item class	This field indicates whether to consolidate order billing history by item class. Valid values are: • Selected = Retain separate order billing history for each item class. • Unselected = Consolidate customer order billing history for all item classes. See Working with Item Classes (WICL).

Field	Description
Long SKU department	This field indicates whether to consolidate order billing history by long SKU department. Valid values are: • Selected = Retain separate order billing history for each long SKU department. • Unselected = Consolidate customer order billing history for all long SKU departments. See Working with Long SKU Departments (WLSD).
Order#	This field indicates whether to consolidate order billing history by order number. Valid values are: • Selected = Retain separate order billing history for each order. • Unselected = Consolidate customer order billing history for all orders.
Transaction code	This field indicates whether to consolidate order billing history by transaction code. Valid values are: • Selected = Retain separate order billing history for each transaction code. • Unselected = Consolidate customer order billing history for all transaction codes. Transaction codes for order billing history are: • E = entry • M = maintenance • B = billing See Reviewing Customer History.
Entity	This field indicates whether to consolidate order billing history by entity. Valid values are: • Selected = Retain separate order billing history for each entity. • Unselected = Consolidate customer order billing history for all entities. See Working with Entities (WENT).

Instructions:

1. Complete the Consolidate transactions up to date field and reset the flag for each selection option you would like to override.
2. Select Submit. The system submits the job CONSOL_OBH in held status. You must release this job to consolidate order billing history. Once released, the batch job consolidates order billing history based on your selection criteria, and produces the Order Billing History Consolidation Report.

Reset Allocation Quantities (MRPC)

Purpose: Use this option to reset the printed quantities for orders, as stored in the Order Detail, Reserved Order Line and the Item Location tables. The system uses the information in the Pick Control Detail and the Pick Location tables to determine the correct quantities.

> **Note:**
>
> To reduce the amount of time it takes to run this process, you should use Streamlined Pick Slip Generation (WSPS) to generate pick slips for as many orders as possible.

If there are inventory transaction errors: The system will not complete this reset if there are any inventory transaction errors. You must reprocess these transactions or delete the error records first. See Working with Inventory Transaction Errors (WITE).

Excluded from reset: The reset excludes any order lines that are:

- printed on drop ship pick slips or purchase orders
- brokered backordered lines being fulfilled through the Order Orchestration integration
- store pickup lines being fulfilled through Order Orchestration

See Order Orchestration Integration for information on fulfilling brokered backorders or store pickup orders through Order Orchestration.

Scheduling: You can schedule when you want this reset to run using the RSTPICK periodic function.

Reset Pick Control Screen

How to display this screen: Enter MRPC in the Fast path field at the top of any menu, or select Reset Allocation Quantities from a menu.

Completing this screen:

#	Step
1.	Select OK on the Reset Pick Control Screen. Select Confirm and then OK again to submit the Allocation Quantity Reset.
2.	**The system submits the** ALLOC_XCHK **job and looks at the setting of the** Inventory Sharing (A69) **system control value.** • If the Inventory Sharing (A69) system control value is selected, the system runs the Allocation Quantity Reset program as a batch job. **Note:** If you are using inventory sharing, run the Allocation Quantity Reset in the company where you actually maintain the inventory and then run the Allocation Quantity Reset in the company(ies) that share the inventory. • If the Inventory Sharing (A69) system control value is blank, the system calls the sp_reset_qty_printed_full SQL stored procedure to perform the Allocation Quantity Reset.
3.	If there are any inventory transaction errors, the job generates an error report indicating that the reset cannot take place until these errors are corrected; see Working with Inventory Transaction Errors (WITE).

#	Step
4.	If there are no inventory transaction errors, the Allocation Quantity Reset: • Clears the Quantity printed for all Item Location, Order Detail, and Reserved Order Line records. • Resets the Quantity printed for all open Order Detail records by summing the Quantity printed on related Pick Control Detail records. • Resets the Quantity printed for all open Reserved Order Line records by summing the Quantity allocated on related Pick Location records. • Resets the Quantity printed for all Item Location records by summing the Quantity allocated on related Pick Location records. • Removes pick slip preparation from the order and then reevaluates the order for pick slip preparation; see Preparing Orders for Pick Slip Generation. Note: • If you ran the Allocation Quantity Reset as a stored procedure (the Inventory Sharing (A69) system control value is unselected), the system also generates the Reset Audit Log for Quantity Printed. • If you ran the Allocation Quantity Reset as a batch job (the Inventory Sharing (A69) system control value is selected), the system also generates the Print Reset Audit Log. • The reset excludes any order lines: – printed on drop ship pick slips or purchase orders – brokered backordered lines being fulfilled through the Order Orchestration integration – store pickup lines being fulfilled through Order Orchestration See Order Orchestration Integration for information on fulfilling brokered backorders or store pickup orders through Order Orchestration.

Reset Reserve Quantity (MRQR)

Purpose: Use this option to reset the reserved quantity of items in inventory, as stored in the Item Warehouse table. The system uses the information in the Reserved Order Line table to determine the correct quantities of items currently reserved on open or held orders.

Scheduling the reset: You can also run this reset using the Daily Inventory Reset periodic function (program name MSR0698); see How to Schedule a Job.

If there are inventory transaction errors: The system will not complete this reset if there are any inventory transaction errors. You must reprocess these transactions or delete the error records first. See Working with Inventory Transaction Errors (WITE).

Reset Reserve Quantity Screen

Purpose: Enter MRQR in the Fast path field at the top of any menu, or select Reset Reserve Quantity from a menu.

Completing this screen:

#	Step
1.	Select OK on the Reset Reserve Quantity Screen. Select Confirm and then OK again to submit the Reserve Quantity Reset.

#	Step
2.	**The system submits the** RESET_RSRV **job and looks at the setting of the** Inventory Sharing (A69) • If the Inventory Sharing (A69) system control value is selected, the system runs the Reserve Quantity Reset program as a batch job. **Note:** If you are using inventory sharing, run the reset in the company where you actually maintain the inventory and then run the reset in the company(ies) that share the inventory. • If the Inventory Sharing (A69) system control value is blank, the system calls the sp_reset_qty_eserved SQL stored procedure to perform the reset.
3.	If there are any inventory transaction errors, the job generates an error report indicating that the reset cannot take place until these errors are corrected; see Working with Inventory Transaction Errors (WITE).
4.	If there are no inventory transaction errors, the Reserve Quantity Reset: • Clears the Quantity reserved for all open or held Order Detail records that do not have any Reserved order lines. • Resets the Quantity reserved for all open and held Order Detail records by summing the Quantity reserved on related open Reserved Order Line records. • Clears the Reserve quantity, S/H reserve quantity, and Reserve transfer quantity for all Item Warehouse records. • Resets the Reserve quantity and S/H reserve quantity for all Item Warehouse records by summing the Quantity reserved on related Order Detail records. • Resets the Reserve transfer quantity for all Item Warehouse records by summing the Actual quantity on related Autostock Replenish Detail records with a status of A. • Generates the Reset Audit Log for Quantity Reserved if the Inventory Sharing (A69) system control value is unselected. **Note:** If the Inventory Sharing (A69) system control value is selected, the reset does not generate a report.

Reset Backorder Quantity (MRBO)

Purpose: Use this option to reset the backorder quantity of items in inventory, as stored in the Item Warehouse table.

Generation options: You can run the reset for all items in all warehouses, or for a specific item/SKU in a specific warehouse. You cannot specify a warehouse unless you also specify an item/SKU:

- Update all Item Warehouse records:
  - If you leave the Warehouse, Item, and SKU fields blank, the job resets all Item Warehouse records and generates a report.
  - If you enter just the Warehouse, the screen displays an error; but if you submit the job anyway, it resets all Item Warehouse records and generates a report.
- Update a single Item Warehouse record: Otherwise, if you specify a warehouse and item/SKU, the job immediately resets just that Item Warehouse and does not generate a report. Since the screen displays the current B/O qty if you enter the warehouse and item/SKU, you can compare this number with the Backorder quantity after you exit the screen.

> **Note:**
>
> If you specify a warehouse and the item code for a SKU'd item, you must also specify a SKU.

Inventory sharing? The setting of the Inventory Sharing (A69) system control value determines which program performs the backorder reset. If this system control value is:

- selected: the system runs a batch job; also, it generates the Reset Audit Log for Item Warehouse unless you specify a warehouse and item/SKU. **Note:** If you are using inventory sharing, run the Item Warehouse Backorder Quantity Reset in the company where you actually maintain the inventory and then run the Item Warehouse Backorder Quantity Reset in the company(ies) that share the inventory.
- unselected: the system runs the sp_reset_qty_backordered SQL stored procedure; also, it generates the Reset Audit Log for Quantity on Backorder unless you specify a warehouse and item/SKU.

Scheduling the reset: You can also run this reset using the Daily Inventory Reset periodic function (program name MSR0698); see Daily Inventory Reset.

Reset Item/Warehouse B/O Quantity Screen

How to display this screen: Enter MRBO in the Fast path field at the top of any menu, or select Reset Backorder Quantity from a menu.

Field	Description
Warehouse	The warehouse whose backorder quantities you want to reset. Leave this field and the Item and SKU fields blank to reset all warehouses. See the discussion on generation options above for more information. Warehouse codes are defined in and validated against the Warehouse table. Numeric, 3 positions; optional.
Item	The item whose backorder quantity you want to reset. Leave this field and the Warehouse and SKU fields blank to reset all items. See the discussion on generation options above for more information. Item codes are defined in and validated against the Item table. Alphanumeric, 12 positions; optional.
SKU	The particular SKU of the item you want to reset. Required if you select a Warehouse and a SKU'd Item; otherwise, leave this field blank. See the discussion on generation options above for more information. **Note:** The SKU field appears as a single, 14-position field. Leave a space between each SKU element, or leave one or more additional spaces if a SKU element is shorter than the full 4 positions. Alphanumeric, 14 positions; required if you selected a SKU'd item.

Field	Description
B/O qty Backorder quantity	The backorder quantity of the selected item/SKU within the selected warehouse. If you specify a warehouse and item/SKU and select OK, this field displays the current backorder quantity for that Item Warehouse. See the discussion on generation options above for more information. Numeric, 7 positions; display-only.

Completing this screen:

#	Step
1.	Optionally, specify the warehouse and item/SKU whose backorder quantity you wish to reset. Select OK to validate your entries.Correct any errors and select OK again. Note: • If you specify a warehouse and item/SKU, the current backorder quantity for the Item Warehouse record is displayed. • If you specify a warehouse but not an item/SKU, the screen displays an error; however, if you submit the reset anyway, the program updates all items in all warehouses.
2.	**Select** Submit Reset **to submit the** RESETBOQTY **job:** Update to Item Warehouse Backorder quantity: • Clears the Backorder quantity for the Item Warehouse records included in the reset. • Resets the Backorder quantity for the Item Warehouse records included in the reset to equal the sum of the related Open and Held non-drop ship order detail lines in the Order Detail table. The system does not include any order detail lines flagged as a future order. Update to Order Detail Open quantity: Open Quantity = (Quantity Ordered - Quantity Cancelled - Quantity Soldout - Quantity Shipped - Quantity Reserved) Report: The system uses the Inventory Sharing (A69) system control value to determine the reset program to use and the report to generate. If you are updating all Item Warehouse and the Inventory Sharing (A69) system control value is: • selected: the reset generates the Reset Audit Log for Item Warehouse. **Note:**If you are using inventory sharing, run the Item Warehouse Backorder Quantity Reset in the company where you actually maintain the inventory and then run the Item Warehouse Backorder Quantity Reset in the company(ies) that share the inventory. • unselected: the reset generates the Reset Audit Log for Quantity on Backorder. **Note:** When you specify a warehouse and item/SKU, the update to the specified Item Warehouse takes place interactively and no report is generated.

Reset Item Warehouse Quantity on Hand (MRIW)

Purpose: Use this option to reset the quantity on-hand for each Item Warehouse record based on the total quantities on-hand for related Item Locations within the warehouse.

Example: The Item Warehouse record indicates that the current on-hand quantity for item AB100 in warehouse 10 is 100. There are two item location records for AB100 in warehouse 10: A010101, with a current on-hand quantity of 15; and BULK, with a current on-hand quantity of 100. This reset adds the on-hand quantities for the two item locations and resets the on-hand quantity for the Item Warehouse to 115 (100 + 15).

Scheduling the reset: You can also run this reset using the Reset On Hand Quantity periodic function (program name PFR0093); see How to Schedule a Job.

Reset On Hand Quantity Screen

How to display this screen: Enter MRIW in the Fast path field at the top of any menu, or select Reset Item Warehouse Quantity On Hand from a menu.

Completing this screen:

#	Step
1.	Select OK on the Reset On Hand Quantity Screen. Select Confirm and then OK again to submit the Item Warehouse Quantity On Hand Reset.
2.	The system submits the RESET_ONHD job and calls the sp_reset_qty_on_hand SQL stored procedure to perform the Item Warehouse Quantity On Hand Reset.
3.	The reset: • Clears the On hand quantity for all Item Warehouse records. • Resets the On hand quantity for all Item Warehouse records by summing the On hand quantity for the associated Item Location records. • Generates the Reset Audit Log for Quantity On Hand. **Note:** The reset takes place regardless of whether there are any Inventory Transaction Errors.

Reset SKU Open Order Quantity (MRSO)

Purpose: Use this menu option to reset the following fields in the SKU table based on the current open orders for the SKU:

- SKU open quantity: the total number of units remaining to be shipped for all open order detail lines, including any quantity reserved and backordered, on open, held, or suspended orders, but excluding drop-ship items and future orders. The Display Item/Warehouse Information Screen displays this field as SKU: Open.
- On hold quantity: the total number of units on held orders, excluding drop-ship items and future orders.
- Quantity order drop ship: the total number of units on open, held, or suspended orders waiting to be drop-shipped, including future orders for drop-ship items. The Display Item/Warehouse Information Screen displays this field as Open D/S.
- Future quantity: the total number of units on open, held, or suspended orders that have the Future order flag set to Y

Scheduling the reset: You can also run this reset using the Daily Inventory Reset periodic function (program name MSR0698); see How to Schedule a Job.

Quotes: Because the system does not reserve inventory for items on quotes, the Reset SKU Open Order Quantity process does not include quotes; see Entering Pre-Order Quotes for an overview.

Reset SKU Open Order Quantity Screen

How to display this screen: Enter MRSO in the Fast path field at the top of any menu, or select Reset SKU Open Order Quantity from a menu.

Completing this screen:

#	Step
1.	Select OK on the Reset SKU Open Order Quantity Screen. Select Confirm and then OK again to submit the reset.
2.	**The system submits the** RSET_SKUOO **job and calls the sp_reset_qty_quantities SQL stored procedure to perform the SKU Open Order Quantity Reset.**
3.	Regardless of whether there are any inventory transaction errors, the SKU Open Order Quantity Reset: • Clears the Open quantity, On hold quantity, and Quantity order direct ship for all SKU records. **Note:** The On hold quantity is based on the Order Header status and not the Order Detail status. • Resets the Open quantity, On hold quantity, and Quantity order direct ship for all SKU records by accumulating the quantities in open, held, and suspended Order Detail records. • Resets the Future quantity for all SKU records by accumulating the quantities in open, held, and suspended Order Detail records with the Future order flag set to Y. • Generates the Reset Audit Log for SKU Quantities. The Order Detail open quantity is calculated as: Quantity Open = (Quantity Ordered - Quantity Cancelled - Quantity Soldout - Quantity Shipped) Note: • The Open quantity in the SKU table includes held orders, which are also included in the Held quantity field in the SKU table. • The Future quantity in the SKU table includes held orders, which are also included in the Held quantity field in the SKU table.

Unlocking a Stranded Order or Batch (MULO)

Purpose: Use this menu option to clear the locked status of a stranded order or order batch so that you can work with it.

Why are orders and batches locked? Order Administration locks an order or batch when a user or process is working with the order, so that another user or process cannot update the order or batch at the same time.

What does the lock consist of? When a user is entering an order or selects an order for maintenance, or when a function is updating an order, Order Administration locks the order by entering the user’s login ID or the function name in the User field in the Order Header table. Similarly, Order Administration locks an order batch by entering the user’s login ID in the Entry user field in the Order Batch table.

How does an order or batch become stranded? Typically, an order or batch becomes stranded when a user is working with it and the session ends unexpectedly, such as when the workstation shuts down. In this situation, the system does not have an opportunity to clear the user ID from the order or order batch record. Similarly, an order or batch can become stranded if a process that is currently updating the record ends abnormally.

How can you tell when an order or batch is locked?

- Order: You can tell that an order is locked if the system displays the Warning: Order Locked window when you attempt to maintain it. This window indicates the name of the user or process using the order, based on the current entry in the User field in the Order Header table.
- Batch: You can tell that a batch is locked if a user ID is displayed in the In use by field at the Work with Error Orders Batches Screen. An error message displays if you try to access the batch: Order Batch is locked by user JJONES.

If a locked order is part of a locked batch: You must first unlock the batch, and then unlock the order.

> **Note:**
>
> The option to unlock an order is also available in Modern View.

Unlock Order or Batch Screen

How to display this screen: You can display this screen by entering MULO in the Fast path field at the top of any menu, or by selecting Unlock Order or Batch from a menu.

Field	Description
Order #	To unlock a stranded order, enter the order number here. You can enter either an order number or a batch number. Numeric, 8 positions; optional.
Batch #	To unlock a stranded batch, enter the batch number here. If your entry in the Order # field was created as part of a batch, the batch number defaults here. You cannot enter both an order number and a batch number. If a batch number has defaulted from the entry of a previous order number, you must clear this field before entering another order number. Numeric, 5 positions; optional.
Order status	The current status of the order. Displayed for orders only. Possible statuses are: • Blank = Open • A = Archived to optical disk • C = Canceled • E = In error • H = Held • Q = Quote • S = Suspended • X = Closed Alphanumeric, 1 position; display-only.

Field	Description
Batch date	The date when the batch was created. Displayed only if you enter a batch number, not if a batch number defaults because it is associated with the entered order number. Displayed for batches only. Numeric, 6 positions (in user date format); display-only.
Order date	The effective date of the order for the purposes of aging and backorder analysis. When you enter an order, the current date defaults, but you can override it. Displayed for orders only. Numeric, 6 positions (in user date format); display-only.
Locked by (order)	The user ID or process name that was updating the order at the time it became stranded. Displayed for orders only. Alphanumeric, 10 positions; display-only.
Entered date	The date when the order was created. Displayed for orders only. Numeric, 6 positions (in user date format); display-only.
Entered time	The time when the order was created. Displayed for orders only. Numeric, 6 positions (HH:MM:SS format); display-only.
Workstation	The ID of the workstation where the user was working when creating the order, or the name of the process that created the order; for example, the workstation is E-COMMERCE for orders created through the *Generic Order Interface (Order API)*. Displayed for orders only. Alphanumeric, 10 positions; display-only. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Entered by	The user ID of the person who entered the order, or the name of the process that created the order. For orders created through the generic order API, this is either the entered_by_user specified in the *Inbound Order XML Message (CWORDERIN)*, or your default user if the entered_by_user is not specified. Displayed for orders only. Alphanumeric, 10 positions; display-only. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Locked by (batch)	The user ID or process name that was working with the batch at the time that it became stranded. Displayed for batches only. Alphanumeric, 10 positions; display-only.
Customer #	A unique number to identify the customer who placed the order (sold-to customer). Displayed for orders only. Numeric, 9 positions; display-only.
Customer name (unlabeled field below the customer number)	The name of the sold-to customer. Displayed for orders only. Alphanumeric, 41 positions; display-only.

Unlocking a batch: Enter the batch number and click OK to display information about the batch and confirm that your entry is correct; if so, select Proceed with Unlock to unlock the batch. The system clears the Entry user field from the Order Batch table, and the batch is now available to be maintained by another user.

Unlocking an order: Enter the order number and click OK to display information about the order and confirm that your entry was correct; if so, select Proceed with Unlock to unlock the order. The system:

- Clears the User field from the Order Header table.
- Removes any pick slip preparation from the order and then reevaluates the order for pick slip preparation; see Preparing Orders for Pick Slip Generation.
- Makes the order available for maintenance by another user. If the order is in an error or suspended status, you must maintain the order in its associated order batch.

> **Note:**
>
> If your initial entry is not correct, exit the screen and then re-enter to clear the information from your previous entries from displaying.

Resetting the Order Billing History Table (ROBH)

Purpose: Use the Reset Order Billing History file menu option to rebuild Order Billing History records for an order using the records in the Order Detail table.

When to run the reset: You should reset Order Billing History at night, when there will not be any activity that might update the Order Billing History table.

Instructions:

1. On the Recover Order Billing History File Screen, use the Starting order # and Ending order # fields to enter an order number or range of orders whose Order Billing History you wish to recreate.
2. Select OK.
3. Select Confirm to submit the OBH_RESET job in a held status.
4. On the Work with Submitted Jobs screen, release the OBH_RESET job from hold to begin the process of rebuilding Order Billing History for the orders you specified.

The OBH_RESET job:

- Deletes all of the Order Billing History records for the specified orders.
- Rebuilds the Order Billing History records for the specified orders, using the associated records in the following tables:
- Order Detail
- Order Ship To
- Source
- Division
- Order Header Extended

- Item
- SKU
- Recovers maintenance transactions from the Order Line History table.
- Recovers billing transactions from the Invoice Detail table.

You can review Order Billing History for a customer on the Order Billing History Detail Screen.

Quotes: The Reset Order Billing History process does not include records in the order tables that are associated with a quote; see Entering Pre-Order Quotes for an overview.

Recover Order Billing History File Screen

Use this screen to define the order number or range of orders whose Order Billing History you wish to recreate, based on the records in the Order Detail table.

How to display this screen: Enter ROBH in the Fast path field at the top of a menu or select Reset Order Billing History File from a menu.

Field	Description
Starting order #	The starting order number in the range whose Order Billing History you wish to recreate, based on the records in the Order Detail table. Numeric, 8 positions; required.
Ending order #	The ending order number in the range whose Order Billing History you wish to recreate, based on the records in the Order Detail table. Numeric, 8 positions; required.

Resetting Customer Sold to Amount on Order (RONO)

Purpose: Use this menu option to reset the On order amount field in the Customer Sold To Order History table so that it matches the amount of any existing open orders for the customer.

You can review the On order amount on the Display Customer Order History Screen. The on order amount is the total value of all open, unshipped orders for a customer, including charges for merchandise, freight, tax, special handling, and shipping. The system subtracts the amount of a cancelled item or order from this field. The on order amount does not include the amount of soldout items on the order.

When should I run a reset? You should only perform a Customer Sold To $ On Order reset if you suspect the On order amount for a sold to customer is incorrect. For example:

- an On order amount exists for a sold to customer that does not have any open orders.
- a negative On order amount exists for a sold to customer.
- an On order amount of 1.00 or less exists for a sold to customer.

> **Note:**
>
> Before you run this reset, you should end all background async jobs so that the On order amount is not changed while the reset job recalculates the On order amount.

Scheduling the reset: You can also run this reset using the Reset Customer Sold To Amount On Order periodic function (program name CSRSTONORD); see How to Schedule a Job.

Quotes: Because the system does not update the Customer Sold To $ On Order for quotes, the Reset Customer Sold To $ On Order process does not include quotes; see Entering Pre-Order Quotes for an overview.

To reset the sold to on order amount: Enter RONO in the Fast path field or select Reset Customer Sold To $ On Order from a menu. The system submits the RESET_CST job. This job:

#	Step
1.	Calls the sp_reset_customer_on_order SQL stored procedure to perform the Customer Sold To $ On Order Reset.
2.	Retrieves all customers from the Customer Sold To Order History table by company code.
3.	For each customer sold to, accumulates the total open balances for Order Ship To records, excluding any Order Ship To records associated with an Order Header status of A, C, X, E, P, or S: • unshipped merchandise balance • freight balance • tax balance • handling balance • additional charges balance • additional freight charges balance
4.	Calculates a grand total by accumulating the total balances.
5.	Compares the grand total to the COH On Order $ field in the Customer Sold To Order History table. • If the amount in the COH On order $ field matches the grand total, the job retains the value in the COH On order $ field. • If the amount in the COH On Order $ field does not match the grand total, the job updates the COH On order $ field with the grand total. If no open balances are found, the job updates the COH On order $ field to 0.

Note:

- Because the Reset Customer Sold To $ On Order process retrieves all customers from the Customer Sold To Order History table, this job may take awhile to complete.
- The Reset Customer Sold To $ On Order process does not reset the Order Header status to closed.

Unlock Purchase Order (MUPO)

Purpose: Use this option to unlock purchase orders so that you can work with or receive it.

About locked purchase orders: A purchase order is locked if the In use USR user field in the Purchase Order Header table is not blank. This situation might occur if, for example, a user's browser window closed during purchase order maintenance. Until you unlock the purchase order, you cannot work with it.

If the purchase order has no detail lines: When you unlock a purchase order that does not have any detail lines, the system deletes the purchase order.

On-order reset: You can also use this menu option to reset the on-order quantity for all Item Warehouse records based on the:

- unreceived quantities on open or held purchase orders
- quantities received into suspense or to a pending putaway warehouse

The on-order reset is also available as a periodic function. See the Reset On-Order PO Quantity Periodic Function for more information.

Unlock Purchase Order Screen

How to display this screen: Enter MUPO in the Fast path field at the top of any menu, or select Unlock Purchase Order from a menu.

Field	Description
PO#	Enter a valid number identifying a purchase order that is currently locked. You cannot prompt on this field. Numeric, 7 positions; required.
When you enter the number of a locked purchase order, the screen displays the following information:	
Status	The purchase order's current status. Possible statuses are: • C = Cancelled. The purchase order was canceled through P.O. Maintenance; it remains on the system for historical purposes. • D = Docked. The purchase order has arrived at the warehouse, but the inventory has not yet been reviewed or formally received. • H = Held. If the purchase order is on hold, you cannot receive it until you approve it through purchase order maintenance. • O = Open. You expect to receive the items on the purchase order. • S = Suspended. Inventory has been received into suspense through purchase order receiving. At a later point, permanent locations in the warehouse will be determined for these items. • X = Closed. All items on the purchase order have been received or closed without full receipt. Alphanumeric, 1 position; display-only.
Entered by	The ID that identifies the user who entered the order. Alphanumeric, 10 positions; display-only.
In use by	The ID that identifies the user who was working with the purchase order when it was locked. Alphanumeric, 10 positions; display-only.

Field	Description
Vendor	The name or description of the vendor with whom you placed the purchase order. From the Vendor record; see Working with Vendors (WVEN) for more information. Alphanumeric, 30 positions; display-only.

Completing this screen:

- Enter a number identifying a purchase order that is currently locked. If your entry is valid, the remaining fields on the screen display information about the purchase order, and a message indicates if the purchase order will be unlocked or deleted:
- Click OK to unlock PO = there is at least one purchase order detail line; the purchase order will be unlocked
- Click OK to delete PO with no details = there are no detail lines for the purchase order; the purchase order will be deleted
- Click OK.

Updates: The system:

- Clears the In use USR user field in the Purchase Order Header table
- If the purchase order does not have any complete detail lines, the system deletes the purchase order header and other related records, such as messages, overrides, estimated charges, and FOB addresses.

Additional updates not processed automatically: Unlocking a purchase order does not submit (or resubmit) the purchase order to the OTHR_ASYNC job. As a result, there is no automatic mechanism to update tables such as Vendor History based on activity that occurred during the creation or maintenance session that resulted in the lock.

Triggering updates:

- You can process additional updates through related jobs such as the on-order reset available at this screen.
- A reset is not available for certain tables, such as Vendor History. For example, if you added a new detail line in maintenance and then the browser window closed unexpectedly, locking the purchase order before you accepted your changes, the information about the new detail line is not reflected in Vendor History when you unlock the purchase order. To trigger these updates, you can select the purchase order for maintenance and then accept the maintenance session without making any changes. The purchase order is then submitted to the OTHR_ASYNC job and the related updates take place, as described in Updates During Background Processing.

Option	Procedure
Submit the on-order reset	Select Reset On Order to run the on-order reset program. This program runs interactively and resets the on-order quantity for all Item Warehouse records in your company based on the current unreceived quantities on all open or held purchase orders, and any purchase orders received into suspense or to a pending putaway warehouse location.

Working with File Uploads (WUPL)

Purpose: Use this menu option to upload a file to a specified table in the Order Administration database.

For more information: See Working with File Imports.

Work with File Upload Screen

Purpose: Use this screen to process a file upload.

RMFCS integration: You cannot use this screen to upload a file for the Oracle Retail Merchandising Foundation Cloud Service (RMFCS) and Oracle Retail Pricing Cloud Service (RPCS) Integration. See Data Flow from RMFCS and RPCS to Order Administration for a process overview. However, you can review uploads from RMFCS on this screen.

How to display this screen: Enter WUPL in the Fast path field at the top of any menu or select Work with File Uploads from a menu.

When you first advance to this screen, processed file uploads display on the screen in descending date sequence.

Column sort: You can sort on any column except Date on this screen by clicking the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Field	Description
File Name	The file to upload to the Order Administration database. Select Browse to locate and select the file to upload. Required.
File Type	The type of upload to perform. Valid values are: • ACS Tape • Catalog Requests • Cust Price Group Exclusions • MBS Tape • PO Layering • Price Codes • Promotions • Retail Integration Items • Sales Associates • Set Components • Source Codes • Stores • USPS Zip Codes • Vendors See Available File Uploads for more information about each upload. **Note:** You cannot use this screen to upload item or offer information from RMFCS; however, completed RMFCS imports are listed at this screen. See Oracle Retail Merchandising Foundation Cloud Service (RMFCS) and Oracle Retail Pricing Cloud Service (RPCS) Integration for background. Required.

Field	Description
An upload history record displays for each file upload that you have begun processing by populating the staging table, or completed processing:	
Date	The date and time when the file upload occurred. A record is written regardless of whether the upload was submitted from the screen or through a periodic function that submitted the file data for processing. Enter a full or partial date and time to review upload history records whose date contains your entry. Optional.
Status	The status of the file upload. • Submitted = The file upload has been submitted for processing. • Uploading = The file is being moved from the client to the server. • Processing = The file upload is currently being processed. • Completed = The file upload was processed successfully. • Error = A record in the upload file failed to upload successfully. See Troubleshooting the File Upload. Enter a full or partial status to review upload history records whose status contains your entry. Alphanumeric, 10 positions; optional.
File Type	The type of file processed. Valid values are: • CSACST = ACS Tape file upload. • IXCRIN = Catalog Requests file upload. • CUSTPGEUP = Cust Price Group Exclusions file upload. • CSMBST = MBS Tape file upload. • POLAYR = PO Layering file upload. • PRICECDUPLOAD = Price Codes file upload. • PRMUPLD = Promotions file upload. • RIIUPP = Retail Integration Items file upload. • SALESREP = Sales Associates file upload. • INSCUP = Set Components file upload. • IXSRCE = Source Codes file upload. • STOREUPL = Stores file upload. • MSUSPS = USPS Zip Codes file upload. • VNDUPL = Vendors file upload. Enter a full or partial file type to review upload history records whose file type contains your entry. See Available File Uploads for more information about each upload. **Note:** You cannot use this screen to upload item or offer information from RMFCS; however, you can use this screen to review RMFCS imports. These uploads are listed with a file type of RIIUPP. See Oracle Retail Merchandising Foundation Cloud Service (RMFCS) and Oracle Retail Pricing Cloud Service (RPCS) Integration for background. Alphanumeric, 15 positions; optional.

Field	Description
File Name	The name of the file that was uploaded. A file path is displayed if the file was uploaded through the screen, rather than through the File Storage API. Enter a full or partial file name to review upload history records whose file name contains your entry. Alphanumeric, 256 positions; optional.
User	The user ID of the user that performed the file upload. A user ID of ADMIN is listed if the upload was processed through the File Storage API. Enter a full or partial user ID to review upload history records whose file name contains your entry. Alphanumeric, 10 positions; optional.

Screen Option	Procedure
Process a file upload	Use the Browse button to select a file for upload, and then select the File Type. See File Upload Process for more information.
Delete an upload history record	Select Delete for an upload history record. At the Are you sure you want to delete the upload history? window, select Yes to delete it; otherwise, select No to cancel. You can also use the PURGEUH Purge Upload History Table periodic function (program name PFR0126) to purge all upload history records that are older than the number of days defined in the Parameter field.
Review the error message associated with an upload history record that is in an Error status	Select View Error to display a window that contains a description of the error that occurred during processing. The window is blank if no error occurred.
Refresh the information on the screen	Select Refresh Page.

Work with Authorization Services (WASV)

For information on:	See:
how the credit card authorization service works, including an **overview** of the available processing options	Using the Credit Card Authorization Interface
setting up the authorization services that your company uses	Defining Authorization Services (WASV)
setting up authorization service countries to cross-reference your country codes to the country codes used by the service bureau. You can also indicate whether the service bureau performs address verification for the country.	Defining Authorization Service Countries

For information on:	See:
setting up the **vendor paytype codes** you use to cross-reference your payment codes to the codes used by the authorization service	Defining Vendor Paytype Codes
setting up the **vendor response codes** that your authorization service uses to indicate whether a credit card is approved or declined, including how to automatically place orders on hold based on the response code	Defining Vendor Response Codes
setting up **merchant ID overrides** for different entities within your company	Defining Merchant ID Overrides
setting up the cross references between your company's **currency** codes and those used by the authorization service	Defining Authorization Service Currencies

Setting Up Authorization Services

Topics in this part: The following topics describe the functions available to define the credit card authorization services that your company uses.

- Reprocess Authorizations Screen (RPAA)

  Reprocess Drop Ship Authorizations Screen (RPDS)
- Working with Required Responses (WREQ)
- Reset Authorizations (RSAA) describes how to reset records in the Credit Card Authorization Transaction table from a *SENT status to a *RDY status so that they can be resent to the authorization service.
- Defining Authorization Services (WASV) shows you how to define the authorization services that your company uses.
- Defining Authorization Service Countries shows you how to cross-reference your country codes to the country codes used by the service bureau. You can also indicate whether the service bureau performs address verification for the country.
- Defining Vendor Paytype Codes shows you how to cross-reference your payment codes to the payment codes used by the service bureau.
- Defining Vendor Response Codes shows you how to define the codes your service bureau uses to identify whether a credit card is approved or declined, and how to have the system place orders on hold based upon the vendor response code.
- Defining Merchant ID Overrides describes how to set up merchant ID overrides for different entities within your company.
- Defining Authorization Service Countries describes how to set up cross references for your company's currency codes and the codes used by a service bureau.
- Performing Online Credit Card Authorizations provides an overview on online credit card authorization and required setup.

- Performing Batch Authorization (SATH) describes how to send credit cards up for batch authorization by the associated ship via.
- Printing the Online Credit Card Authorization List (PATL) describes how to print the Online Authorization Listing.
- External Payment Service for information on a RESTful web service that provides an interface from Order Administration for sending stored value card transactions and receiving responses. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Reprocess Authorizations Screen (RPAA)

Purpose: Run this recovery program if an error occurs when transmitting an Authorization (either sending or receiving) or if you responded to an error with a C (to cancel the transmission) and there are stranded records in the Credit Card Authorization Transaction table (CCAT00).

This procedure enables you to resend all records that have not been sent or received and process the authorizations.

> **Note:**
>
> When you reprocess authorizations, the system sends all authorization transactions that exist in the CC Authorization Transaction file to the authorization service, regardless if the order is a drop ship order or regular order.

Selecting this option: Enter RPAA in the Fast path field at the top of any menu screen or select the Reprocess Authorizations option from a menu.

Retransmitting Authorizations

Select the Transmit/Receive/Process Authorizations option at the Reprocess Authorizations Screen (RPAA) if you need to retransmit Authorizations.

This option resends all records in the CC Authorization Transaction table (CCAT00) that have not been sent, regardless if the order is a regular order or drop ship order. These records have a status of ***RDY** in this table.

Records successfully sent have a status of ***SENT**.

> **Note:**
>
> You can use the Reset Transmission Status Screen to reset records in the Credit Card Authorization Transaction table (CCAT00) from a *SENT status to a *RDY status.

The Enter Pick Options window opens when you select this option. This window gives you the same options you can select at Pick Slip Generation run-time.

Field	Description
Combine customer picks	Indicates whether the system will combine multiple orders for a single customer. For example, if the customer has two 1-item orders that can fit into one box, under normal cubing rules, the system would split them into two pick slips because they belong to different orders. Using this feature, however, the system combines them into a single pick slip. Valid values are: • Selected = Combine pick slips. • Unselected = Do not combine pick slips.
Complete orders only?	Indicates whether the system will ship orders that have been completely filled. Valid values are: • Selected = Ship orders that have been completely filled; do not ship orders with backordered items • Unselected = (Default;: Ship full and partially filled (backordered) orders.
Perform best way	This field is not currently implemented; leave this field unselected.
Override ship via	Allows you to replace the ship via code on the pick slip and ship all orders with this shipper. Enter a valid shipper code here, if you want all shippable orders being authorized by this service bureau to ship by this carrier. Ship via codes are defined in and validated against the Ship Via table. Numeric, 2 positions; optional.

Receiving Authorizations

Select the Receive/Process Authorizations option at the Reprocess Authorizations Screen (RPAA) if you need to receive the Authorizations from the service bureau and process the authorizations.

Records successfully received have a status of ***RCVD and have pick slips if authorized or no AVS hold or card identification hold. Also, an Authorization History record is created when creating the Pick Control Header and Detail records and is updated when the authorization or decline is received. When an authorization is received, the Authorization History record is updated with the authorization code, authorization date, and authorization amount.

If an authorization is declined, no pick slips print and the Authorization History record is updated with the decline code.

The Enter Pick Options window displays when you select this option.

Complete this window as needed.

The Select Authorization Service window opens. Select Select Request for the service bureau that you are receiving authorizations from. The REPROCESS job is submitted and the following reports are produced:

- Credit Card Authorization Listing
- Address Verification Response List (if the service bureau provides AVS)

- Declined Drop Ships
- Pick/Authorization Listing

By default, the REPROCESS job is submitted to the PICKGEN job queue at the Job Management Screen rather than the QBATCH job queue.

Address verification: If the service bureau provides AVS (address verification service), it evaluates the billing address on the credit card to ensure that it is valid. If not, the credit card charge may be authorized, but the order may be placed on hold, based on the response code for the authorization service. This gives you the opportunity to contact the customer and obtain the correct address. For example, the order is placed on hold if the customer's address is correct, but the zip code is incorrect. Once you contact the customer and update the zip code, you may take the order off of hold through the Release Held Orders function.

Credit card identification: If the service bureaus also provides credit card identification (CID, CVV2, or CVC2), it evaluates the card identification number on the credit card to ensure that the credit card data from the transaction matches the data stored by the service bureau for that card. If not, the credit card charge may be authorized, but the order may be placed on hold, based on the response code for the service bureau. Once you verify credit card ownership, you can take the order off of hold through the Release Held Orders (ERHO) menu option. See Credit Card Security Service (CID, CVV2, CVC2).

The credit card authorization is captured in the Authorization History table. The order will not be resent for authorization as long as the authorization is valid (based on the number of days in the Reauthorization days field in the Pay Type table).

Reprocess Drop Ship Authorizations Screen (RPDS)

Purpose: Run this recovery program if an error occurs when transmitting Authorizations (either sending or receiving) for a drop ship order or if you responded to an error with a C (to cancel the transmission) and there are stranded records in the Credit Card Authorization Transaction table (CCAT00) for drop ship orders.

This procedure enables you to resend all records that have not been sent or received and process the authorizations.

> **Note:**
>
> When you reprocess drop ship authorizations, the system sends all authorization transactions that exist in the CC Authorization Transaction table to the service bureau, regardless if the order is a drop ship order or regular order.

Selecting this option: Enter RPDS in the Fast path field at the top of any menu screen or select the Reprocess Drop Ship Authorizations option from a menu.

Retransmitting Authorizations

Select Transmit/Receive/Process Authorizations if you need to retransmit Authorizations.

This option resends all records in the CC Authorization Transaction table (CCAT00) that have not been sent, regardless if the order is a drop ship order or regular order. These records have a status of *RDY in this table.

Records successfully sent have a status of *SENT.

The Enter Drop Ship Options Window opens when you select this opti

Enter Drop Ship Options Window

This window gives you the same options you can select during Drop Ship Processing.

Field	Description
Print drop ship purchase orders	Indicates whether to print drop ship purchase orders. Valid values: • NONE (no print) = The system will not print drop ship purchase orders. • PURCHASE ORDER (Purchase order print) = The system prints drop ship purchase orders in purchase order number sequence. The system uses the PO Print Program for PO Print in PO Sequence (C76) system control value to print drop ship purchase orders in purchase order number sequence. • VENDOR (Vendor print) = The system prints drop ship purchase orders in vendor number sequence. The system uses the PO Print Program (C64) system control value to print drop ship purchase orders in vendor number sequence. **Note:** Drop ship purchase orders print only if: • the vendor's Drop ship output field = Drop ship purchase order, and • the vendor's Print PO field = selected, and • the Print drop ship purchase orders field on the Enter Drop Ship Options window = Purchase order The system also prints a Drop Ship Pick Slip/Invoice for the drop ship purchase order. The system also creates pick download triggers (File code of PCH) in the IL Outbound Trigger table when you generate a drop ship pick (invoice) if the Create Generic Pick Download Triggers (I31) system control value is selected. The PICK_OUT process in Working with Integration Layer Processes (IJCT) generatesthe Pick Message from Order Administration (CWPickOut) for each of these trigger records. Required.
Fax picks to vendors	Indicates whether the drop ship pick slips or invoices should be faxed to the vendor instead of printed. This option is not currently implemented.

Receiving Authorizations

Select Receive/Process Authorizations at the Reprocess Drop Ship Authorizations Screen (RPDS) if you need to receive the Authorizations from the service bureau and process the authorizations.

Overview: When you receive authorizations, records successfully received have a status of *RCVD and have drop ship output (pick slip or purchase order) if authorized or no AVS hold or card identification hold. When an authorization is approved, the Authorization History record is updated with the authorization code, authorization date, and authorization amount.

If an authorization is declined, no drop ship output (pick slip or purchase order) prints and the Authorization History record is updated with the decline code.

When you select the Receive/Reprocess Authorizations option:

1. The Enter Drop Ship Options window opens; see above for more information.
2. After you complete this window, you advance to the Select Auth Service window. Select the service bureau that you are receiving an authorization file from to submit the REPROC_DS job and produce the following reports:

- Credit Card Authorization Listing
- Address Verification Response List (if the service bureau provides AVS)
- Declined Drop Ships
- Vendor Drop Ship Worksheet
- Drop Ship Purchase Order List (if the drop ship output is purchase orders)
- Drop Ship Pick Slip/Invoice (the system generates a drop ship pick slip/invoice when the drop ship output is pick slips or purchase order)
- Purchase Order (if the drop ship output is purchase orders)

Address verification: If the service bureau provides AVS (address verification service), it evaluates the billing address on the credit card to ensure that it is valid. If not, the credit card charge may be authorized, but the order may be placed on hold, based on the response code for the authorization service. This gives you the opportunity to contact the customer and obtain the correct address. For example, the order is placed on hold if the customer's address is correct, but the zip code is incorrect. Once you contact the customer and update the zip code, you may take the order off of hold through the Release Held Orders (ERHO) menu option. See Address Verification Service (AVS).

Credit card identification: If the service bureaus also provides credit card identification (CID, CVV2, or CVC2), it evaluates the card identification number on the credit card to ensure that the credit card data from the transaction matches the data stored by the authorization service for that card. If not, the credit card charge may be authorized, but the order may be placed on hold, based on the response code for the authorization service. Once you verify credit card ownership, you can take the order off of hold through Release Held Orders. See Credit Card Security Service (CID, CVV2, CVC2).

The credit card authorization is captured in the Authorization History table. The order will not be resent for authorization as long as the authorization is valid (based on the number of days in the Reauthorization days field in the Pay Type table).

Working with Required Responses (WREQ)

> **Note:**
>
> This menu option is no longer used.

Purpose: Use this menu option to respond to Order Administration jobs that require user intervention in order to proceed.

Why would a job require user intervention?

- An error occurred during processing

- The job is used to send transactions to another system and communication failures occur before the transmission completes

Which types of job require user intervention?

- Stored Value Card (activation, balance inquiry and authorization reversal)
- Batch Authorization
- Batch Deposit

Required Response Processing

When a job requires user intervention, Order Administration:

1. Generates a Response Required Email, indicating a job requires user intervention.
2. Creates a record in the Response Required (MSRREQ) table. You can review the records in the Response Required table at the Work with Required Responses Screen.
3. Creates a message in the RESP.log indicating a job requires user intervention.
4. Order Administration waits 60 seconds for a user response.
5. After 60 seconds, Order Administration reviews the Response Required table to determine if a user responded to the response required message.

If a user responds: A user can respond to a job that requires user intervention at the Reply To Message Screen. If a user responds to a response required message, Order Administration:

- uses the response to proceed with the job.
- deletes the record from the Response Required table.
- creates a message in the RESP.log, indicating a user responded to the response required message.

If a user does not respond: If a user does not respond to a response required message, Order Administration looks at the RESPONSE_RETRIES property in Working with Admin Properties (CPRP) to determine the number of times it should look for a response for the job. Order Administration compares the Sent date and time to the Last polled date and time to determine if the number of times has been reached.

If the number of times to look for a user response has not been reached, Order Administration:

- updates the Last polled date and time in the Response Required table with the last polled date and time.
- After every fifth attempt, writes a message to the RESP.log, indicating a user response had not yet been received.
- goes back to sleep for another 60 seconds.

If the number of times to look for a user response has been reached, Order Administration:

- deletes the record in the Response Required table.
- uses a default response in order to proceed with the job. For example:
- the default response for a transmission job in a receive status is R (Resend).
- the default response for a transmission job in a sent status is C (Cancel).

> **Note:**
>
> - For the batch authorization job, the status of each record in the CC Authorization Transaction table remains in its current status so that you can use the Reprocess Authorizations Screen (RPAA) to recover the response.
> - For the batch deposit job, the status of each record in the CC Deposit Transaction table remains in its current status so that you can use the Receive option in Processing Auto Deposits (SDEP) to recover the response.
> - sends a Response Required Email, indicating the default response was used for the job.
> - writes a message to the RESP.log, indicating the default response was used.

If a user deletes the response required message: If a user deletes a response required message at the Work with Required Responses Screen, the system:

- uses a default response in order to proceed with the job. For example:
- the default response for a transmission job in a sent status is C (Cancel).
- the default response for a transmission job in a receive status is R (Resend).
- sends a Response Required Email, indicating the default response was used for the job.
- writes a message to the RESP.log, indicating the default response was used.

Response Required Email

This email is generated when a Order Administration job requires a user response in order to proceed.

The RESPONSE_EMAILS setting in the Notify Properties defines the email address(es) that receive this email.

Order Administration generates an email when:

- A job initially requires user intervention.
- A user does not respond to the response required message and the default response was used.

Sample first email:

From: cwjava@example.com

Subject: Process Authorizations

Response required for job. Please go to WREQ to view the error and enter a response.

Sample second email:

From: cwjava@example.com

To: Eleanor Johnson

Subject: Process Authorizations

No response received after 5 attempts, default used.

Contents:

- From: The mail.from setting in the Email Properties file.
- To: The user name for the RESPONSE_EMAILS property in Working with Admin Properties (CPRP).
- Subject: Process, followed by the job name. For example, Process Authorizations.
- Body:
- First email: Response required for job. Please go to WREQ to view the error and enter a response.
- Second email: No response received after 5 attempts, default used.

RESP.log

Order Administration writes messages to the RESP.log file when a job requires user intervention.

Location: /domain/conf/OMSFiles/Logs/RESP/, where domain is the WebLogic domain directory for Order Administration on the application server.

Message	Written When
Deposits - Response required for job. E-Mail sent to:email1@cware.com; email2@cware.com	Order Administration generates a Response Required email, indicating a job requires user intervention. In this example, Deposits is the job name and email@cware.com is the email address to receive the Response Required email.
Deposits - Received R response from BMIRANDA	A user responded to a response required message at the Reply To Message Screen. In this example, Deposits is the job name and BMIRANDA is the user that responded to the job.
Deposits - No response after 5 attempts, will retry	Order Administration reviewed the Response Required table five times to determine if a user responded to the response required message. In this example, Deposits is the job name.
Deposits - No response after 10 attempts, will retry	Order Administration reviewed the Response Required table ten times to determine if a user responded to the response required message. In this example, Deposits is the job name.
Deposits - No response received, default response used	The number of times to look for a response in the Response Required table has been reached without a response from a user. Order Administration uses the default response for the job. In this example, Deposits is the job name.
Deposits - Response Required entry not found, default response used	A user deleted a response required message at the Work with Required Responses Screen. Order Administration uses the default response for the job. In this example, Deposits is the job name.

Work with Required Responses Screen

Use this screen to review the jobs that require user intervention in order to proceed.

> **Note:**
>
> This screen is not company or user specific; all jobs that require user intervention display on the screen, regardless of the company where the job was submitted or the user that submitted the job.

How to display this screen: Enter WREQ in the Fast path field or select Work with Required Responses from a menu.

Field	Description
Message	Indicates the reason a job requires user intervention. For example, if transmission errors occur for a batch authorization: Error occurred during authorization transmission Alphanumeric, 75 positions; display-only.
Job	The name of the job that requires user intervention. Valid values are: • Stored Value Card • Authorizations • Deposit Display-only.
Sent	The date and time a Response Required Email was sent to the user, indicating a job requires a user response. Alphanumeric, 50 positions (YYYY.MM.DD HH:MM:SS format); display-only.
Last polled	The date and time Order Administration last reviewed the response required message to determine if a response was received from a user. Alphanumeric, 50 positions (YYYY.MM.DD HH:MM:SS format); display-only.

Screen Option	Procedure
Reply to a response required message	Select Change for a response required message to advance to the Reply To Message Screen.
Delete a response required message	Select Delete for a response required message to advance to the Confirm Delete window. At this window, select Delete to delete it. When you delete a response required message, Order Administration: • uses a default response in order to proceed with the job. • sends a Response Required Email, indicating the default response was used for the job. • writes a message to the RESP.log.

Reply To Message Screen

Purpose: Use this screen to reply to a job that requires user intervention.

An error message indicates if a job used the default reply while you were on this screen: Update not accepted - record has been changed by another user since it was displayed.

How to display this screen: Select Change for a job on the Work with Required Responses Screen.

Field	Description
Message text	Indicates the reason a job requires user intervention. For example, if transmission errors occur for a batch authorization: Error occurred during authorization transmission Alphanumeric, 75 positions; display-only.
Enter reply	Enter your response to the job. The Choices field provides a list of valid responses. Alphanumeric, 1 position; required.
Choices	The valid responses you can enter for a job that requires user intervention. Valid values are: • C = Cancel the job. • R = Resubmit the job. Alphanumeric, 1 position; display-only.
Job name	The name of the job that requires user intervention. Valid values are: • Stored Value Card • Authorization • Deposit Alphanumeric, 50 positions; display-only.
Message sent	The date and time a Response Required Email was sent to the user, indicating a job requires user intervention. Alphanumeric, 50 positions (YYYY.MM.DD HH:MM:SS format); display-only.

Notify Properties

In order to respond to Order Administration jobs that may require user intervention to proceed, you must set up the Notify Properties in Working with Admin Properties (CPRP).

Why would a job require user intervention?

- An error occurred during processing
- The job is used to send transactions to another system and communication failures occur before the transmission completes

Which types of jobs require user intervention?

- Stored Value Card (activation, balance inquiry or authorization reversal)
- Authorization (batch only, for all card types)
- Deposit

Property Name	Description
RESPONSE_RETRIES	The number of times Order Administration looks for a response to a job that requires user intervention before using the default response in order to proceed with the job. For example, if this setting is 5, Order Administration will look for a user response five times, waiting 60 seconds between each time.
RESPONSE_EMAILS	The list of email addresses that receive the Response Required email when a job requires user intervention. Each email address entered must be separated by a semi-colon (;). For example: email1@add.com;email2@add.co

Reset Authorizations (RSAA)

Purpose: Use this menu option to reset records in the Credit Card Authorization Transaction table (CCAT00) from a *SENT status to a *RDY status so that they can be resent to the authorization service.

This menu option is useful as a recovery program if an error occurs when transmitting an Authorization to the service bureau or if you responded to an error with a C (to cancel the transmission) and there are stranded records in the Credit Card Authorization Transaction table.

Once the records are reset to a *RDY status, you can use the Reprocess Authorizations Screen (RPAA) to resend all records in the Credit Card Authorization Transaction table that have not been sent and process the authorizations.

Reset Transmission Status Screen

Use this screen to select the authorization service whose records in a *SENT status in the Credit Card Authorization Transaction table you wish to reset to a *RDY status.

To reset the transmission status:

#	Step
1.	Confirm with the service bureau whether the authorization transmission was received. • If the service bureau received the authorization transmission, do not reset the transmission status to *RDY; instead, use the Receive/Process Authorizations option in Reprocess Authorizations Screen (RPAA) to receive the authorization response. • If the service bureau did not receive the authorization transmission, continue to the next step.
2.	At the Reset Transmission Status screen, enter a valid authorization service in the Select authorization service field.
3.	Select OK. The system: • updates the records in a *SENT status in the Credit Card Authorization Transaction table to a *RDY status. • returns you to the main menu and displays a message similar to the following: Records for PMT. Transmission may now be resent.

#	Step
4.	Use the Transmit/Receive/Process Authorizations option in Reprocess Authorizations Screen (RPAA) to resend all records in the Credit Card Authorization Transaction table that have not been sent or received and process the authorizations.

Field	Description
Select authorization service	Select the authorization service whose records in a *SENT status in the Credit Card Authorization Transaction table you wish to reset to a *RDY status. Required.

Performing Batch Authorization (SATH)

Purpose: Use this menu option to receive authorizations for credit cards that did not receive an authorization during order entry. This menu option sends credit cards up for authorization in a batch by the associated ship via. The system looks at the ship via defined on the order header to determine which credit cards are sent to the service bureau for authorization.

You may wish to use this menu option if:

- communication failures occurred when you tried to authorize the credit card during order entry or order maintenance.
- the credit card received an authorization during order entry, but not for the entire dollar amount associated with the card.
- the credit card received a declined authorization during order entry.
- the credit card was approved in order entry or order maintenance, but the authorization has expired.
- the credit card was approved in order entry or order maintenance, but the card failed AVS verification or card security identification (CID, CVV2, CVC2); see Address Verification Service (AVS) and Credit Card Security Service (CID, CVV2, CVC2)

> **Note:**
>
> You must authorize credit cards prior to generating pick slips if the Batch/online field for the service bureau is set to I (online only). You can perform online credit card authorization during order entry when you select Accept to accept the order, during order maintenance at the Enter Payment Methods Screen in Order Maintenance, or using this menu option.

Periodic function: The AUTHALL Authorize All Open Orders periodic function (program name PFR0131) allows you to use the job scheduler to schedule when you wish to process the Batch Authorization Program (SATH).

In this topic:

- Batch Authorization Process
- Batch Authorization Selection Screen

Batch Authorization Process

When you select Accept at the Batch Authorization Selection screen, the system submits the Get Online Authorization program.

#	Step
1.	The system determines the orders eligible for authorization, checking for Void Authorizations, the available authorized amount from Authorization History, and any existing picks with valid authorizations. • If a ship via has not been defined at the Batch Authorization Selection Screen, the system reviews by order number all open order ship to records. • If a ship via has been defined at the Batch authorization Selection Screen, the system only reviews by order number open order ship to records associated with the specified ship via. If the ship via matches, the system selects the entire order, across all ship to customers.
2.	The system performs the same steps as in order entry to determine if an order is eligible for online authorization and the information that is updated; see Receiving a Credit Card Authorization During Order Entry. **Note:** The system does not display the Select Authorization Response Option Window when you authorize credit cards using batch authorization.
3.	The system prints the Online Credit Card Authorization Listing for credit cards that received a declined authorization.

For more information: See Processing Authorizations and Deposits using an Integration Layer Process for more information on communicating with a service bureau via an integration layer job.

Batch Authorization Selection Screen

Purpose: Use this screen to select the ship vias associated with the credit cards you wish to send for authorization.

How to display this screen: Enter SATH in the Fast path field at the top of a menu or select Batch Authorization Program from a menu.

Field	Description
Ship via	A code for the ship via associated with the orders that contain credit cards you wish to send for authorization. Ship via codes are defined in and validated against the Ship Via table. Numeric, eight 3-position fields; optional.

Screen Option	Procedure
Submit the batch authorization program	Select Accept. See Batch Authorization Process. A message indicates that the job has been submitted: BATCH_AUTH submitted

Printing the Online Credit Card Authorization List (PATL)

Purpose: Use the screen to select the criteria you wish to use to print the Online Authorization Listing. This report lists credit cards that have been authorized using the online credit card authorization process. See Performing Online Credit Card Authorizations for an overview and required setup.

You can use this report to review credit cards that have been authorized, declined, authorized but not used, or sent for authorization for a specific date range.

The system looks at records in the Authorization History table and the Online Authorization table to determine what information prints on this report.

> **Note:**
>
> You can print a similar report for credits cards that are authorized during pick slip generation; see Credit Card Authorization Listing.

In this topic:

- Authorization Listing Screen
- Online Credit Card Authorization Listing

Authorization Listing Screen

How to display this screen: Enter PATL in the Fast path field at the top of a menu or select Print Credit Card Authorization List from a menu.

Field	Description
Authorization date range	The authorization date range you wish to use to generate the Authorization Listing. The system only prints authorizations that have been received for this specific date range. Enter a beginning date in the first field and enter an ending date in the second field. If you do not enter an ending date in the second field, the system defaults the beginning date, indicating the report will print for this date only. A message displays if you enter a beginning date that is greater than the ending date: From Date must be less than To Date A message displays if you enter a future date in the starting date or ending date: Date entered must not be greater than today's date Numeric, two 6 position fields (in user date format); beginning date required, ending date optional.

Field	Description
Status (Authorization status)	A code that indicates the status of the credit card authorization. Valid values are: blank = the credit card has not yet been sent for authorization Authorized = the credit card has been authorized Declined = the credit card has been declined Authd but not used = the credit card has been authorized, but the authorization has not been used Sent for authorization = the credit card has been sent to the authorization service for authorization If you enter a status, the system prints the Authorization Listing only for authorizations that contain this status. If you do not enter a status, the system prints the Authorization Listing for all eligible authorizations, regardless of status. Authorization status codes are defined in and validated against the Authorization Status table. Optional.
Held orders	Indicates whether authorizations on held orders print on the Authorization Listing. The system uses the Status field on the order header to determine if an order is held. Selected = Authorizations for held orders print on the Authorization Listing. Unselected = Authorizations for held orders do not print on the Authorization Listing. This report only displays authorizations for open orders.
Report sorts	Determines the sort on the Authorization Listing. Pay Type/Auth Date/Status = The Authorization Listing sorts in pay type/authorization date/status order. Status/Pay Type/Credit Card # = The Authorization Listing sorts in status/pay type/credit card number order. Numeric, 1 positions; required.
Response code	The authorization response you wish to use to generate the Authorization Listing. If you enter a response code, the system only prints authorizations that received this response. **Note:** If you enter a response that does not match the Status (Authorization status), nothing prints on this report. For example, if you enter D (declined) in the Status field and enter a response code of 100 (approve), nothing prints on the report because approved responses would never be put in a declined status. Vendor response codes are defined in and validated against the CC Vendor Response table; see Defining Vendor Response Codes. Alphanumeric, six 10 position fields; optional.

Screen Option	Procedure
Accept the criteria you defined and generate the Authorization Listing	Select Accept. The system displays a submit job message at the bottom of the screen indicating the Online Credit Card Authorization Listing has been submitted.

Purging Tables

Topics in this part:

- Purging Prestige Credit Card Deposits (MPSP) describes how to purge processed records from the Credit Card Deposit Prestige table.
- Purging Orders (MPOR) described how to purge closed and canceled orders based on the date of last activity.
- Purging Sold To Customers describes how to purge eligible sold to customers based on the customer's last change date.
- Purging Suspended Orders (PSOR) describes how to remove orders in a suspended status from the system.
- Purging SKUs (MPSK) described how to remove item/SKUs based on item status from the system.
- Additional Purges summarizes the additional purges available.

Purging Prestige Credit Card Deposits (MPSP)

Purpose: When you use Processing Auto Deposits (SDEP), the system processes deposits and credit card credits in your local currency interactively with your deposit service. You have the option, however, of processing deposits and credits in foreign currencies separately to capture the currency conversion rate at the time of billing. To do so, you must use a deposit service defined as Prestige (authorization service code = PRE) in the Authorization Service table.

The system writes the invoice information on foreign currencies using the separate process to the Credit Card Deposit Prestige table (CCCDPP). You then extract invoice records from this table to send to the deposit service.

Credit card encryption: Credit card encryption allows you to encrypt the credit card number in the Order Administration database to provide additional security of credit card data. If you use credit card encryption, the credit card number in the Credit Card Deposit Prestige table will not be encrypted because the information in this table is extracted to an external system. See the Data Security and Encryption Guide on My Oracle Support (2953017.1) for an overview.

You must use the Purge Prestige Credit Card Deposits function to purge the processed records from the Credit Card Deposit Prestige table.

For more information: See Defining Authorization Services (WASV).

In this topic:

- Purge Credit Card Deposits Prestige Screen

Purge Credit Card Deposits Prestige Screen

How to display this screen: Enter MPSP in the Fast path field at the top of any menu or select Purge Prestige Credit Card Deposits from a menu.

Field	Description
Start date	The beginning date of the records to purge from the Credit Card Deposit Prestige table. This is the date you used the Process Auto Deposits to create the deposit or credit card credit record in the table. The purge will include transactions processed on that date and later. Numeric, 6 positions (in user date format); required.
End date	The ending date of the records to purge from the Credit Card Deposit Prestige table. This is the date you used the Process Auto Deposits function to create the deposit or credit card credit record in the table. The purge will include transactions processed on that date and earlier. Numeric, 6 positions (in user date format); required.

Screen Option	Procedure
Purge records	Select Accept.

Purging Orders (MPOR)

Purpose: Use the Purge Orders screen to purge closed and canceled orders that have been inactive for a given period.

Which orders are purged? In addition to being closed or cancelled, the order must:

- not have had any activity for the Order Purge Days (C62) defined in the System Control table. For example, if the order purge days is 365, a closed or canceled order will be eligible for purging if the order has not been entered, shipped, or maintained for one year. The system checks the Order date from the Order Header table and the dates from the Order Transaction History table for the most recent activity.
- not have any pending returns or refunds.

Additional purge option: You can also use the PURGEOR periodic function. This function also uses the rules described above to determine whether an order is eligible for purge.

Purged Order List? If you use the PURGEOR periodic function and set the function's Parameter to Y, the submitted job also produces the Purged Order List when you use the Purge Orders Screen (MPOR).

Purging an individual order: To purge an individual order, use the Purge Orders by Order Number (MORP) option. With this option, you can delete an order even if there has been activity more recently than the Order Purge Days (C62).

Updated tables: See the Order-Related Tables for a listing of the tables purged through the Purge Orders Screen (MPOR), the Purge Orders by Order Number (MORP) option, or the PURGEOR periodic function.

The system does not delete the customer's order, item, or correspondence history; you can review this information through the Work with Customers function.

> **Note:**
>
> When you purge orders through the Purge Orders screen or the PURGEOR periodic function, the system does not create records in the Deleted Order Table.

In this topic:

- Purge Orders Screen (MPOR)
- Order-Related Tables

For more information: See:

- How to Schedule a Job for information on scheduling a periodic process that includes the PURGEOR periodic function
- Working with Periodic Functions (WPER) for information on setting up periodic functions
- Purge Orders by Order Number (MORP) for information on the screen you can use to purge individual orders

Purge Orders Screen (MPOR)

How to display this screen: Enter MPOR in the Fast path field at the top of any menu or select Purge Orders from a menu.

Field	Description
Purge date	The system subtracts the Order purge days from this date to calculate a cutoff date for purging orders. For example, if the purge date is 9/30, and the order purge days are 30, the system subtracts 30 days from 9/30 to arrive at a cutoff date of 8/31. Closed and canceled orders that have not been entered, shipped, or updated in any way since the cutoff date will be purged. See the discussion above under Purging Orders (MPOR) for more information. The system defaults the current date into this field; however, you can override it with an earlier date. Numeric, 6 positions (in user date format); required.
Order purge days (Highlighted number in the narrative on the center of the screen)	The number of days an order must have been inactive since the purge date to be eligible for purging. From the Order Purge Days (C62) system control value. Numeric, 7 positions; display-only.

Completing this screen: Optionally, enter an earlier date in the Purge date field and click OK, then select Accept. The system submits the ORDER_PURG job and returns you to the previous screen. This job purges all orders inactive since the calculated cutoff date (Purge date - Order purge days).

> **Note:**
>
> This job does not update the Deleted Order Table.

Possible errors: The screen might display an error message if, for example, there is a communication failure with EFTConnect. In this case, because payment-related records for orders cannot be purged, the order purge fails. See the Payment Configurations screen in Modern View for background.

Order-Related Tables

Purpose: The system purges records in the following order-related tables when you use the PURGEOR periodic function, the Purging Orders (MPOR) option, or the Purge Orders by Order Number (MORP) option.

Table Name	System Name
AA Void	AAVOID
Authorization History	AUTHHS
Auto Soldout	CSAUSO
Backorder Cancellation Pending	BOCANP
Carton Contents	CartonContents
CC Deposit History	CCDPHI
Correspondence History **Note:** The associated record in this table and in the Correspondence History Detail table are not deleted; however, the system deletes the order number. The correspondence history is still available for review by inquiring on the customer(s) on the order.	MSCOHS
Customer Sold To Promotion	OECSPR
Drop Ship Pending	FLDSPN
Drop Ship Work	DRPSHW
Expected Ship Date	CSEXSD
Invoice Address	OEINAD
Invoice Cross Reference	FLINXR
Invoice Currency	MSINCU
Invoice Detail	OEINDT
Invoice Detail Charge	INIDCP
Invoice Detail Cost	INIVCP
Invoice Detail Pay Method	CSINDP
Invoice Header	OEINHD
Invoice Payment Method	CSINVP

Table Name	System Name
Invoice Ship To	OEINSH
Manifest	FLMANF
Narvar Export Errors	INT_NARVAR_EXPORT_ERROR
On Line Authorization	CCOLAT
Order Additional Charge	OEOADC
Order Orchestration	oeorbk
Order Orchestration History	oeorbh
Order Coupon Discount	OEOCDP
Order Cross Reference	OEORXR
Order Detail	OEORDT
Order Detail Coupon	OECPDC
Order Detail Deal Audit	OEDDAU
Order Discount Audit	OEODIS
Order Free Gift	FREGFT
Order Header	OEORDR
Order Header Extended	OEOHEP
Order Header User Field	OEORHU
Order I/T Line	CSIOTL
Order Line History	OEOLHS
Order Line Message	OELNMS
Order Message	OEOMSG
Order Payment History	OEPAYH
Order Payment Method	OEPAYM
Order Promotion	OEORPR
Order Ship To	OEORST
Order Ship To Address	OEOSTA
Order Shipment Details	ORDER_SHIPMENT_DETAILS
Order Special Format	OESHFM
Order Special Handling	OESHIN
Order Transaction History	OEOTHI
P/O Detail D/S Order	PODTDS
Pick Slip Gen Sel Order	PSGORD
RA Detail	CSRADT
RA Exch Payment Method	CSRAPM
RA Exchange Item	CSRAXI
RA Header	CSRAHD
Refund	CSRFND
Refund Message	CSRMFF
Return Notifications	OERSCP

Table Name	System Name
Refund Print	CSRFPT
Refund Print Detail	CSRDTP
Reserved Order Line	FLRSOL
Sold Out Notification	SONTFY
Stored Value Card	OESVCD
Tax Exception	OETXEX
Tickler	MSTKLR
Tickler History	MSTKHS
Variable Set Order Hold	VSHOLD
WMS Carton Header Detail	WMCAHD

Purging Suspended Orders (PSOR)

Purpose: Use the Purge Suspended Orders menu option to remove orders in a suspended or error status from the system.

You might have orders in suspended or error status due to error or malfunction; for example, if you were entering an order when your terminal froze or a program halted, the order would remain in suspended status. You would never be able to process such an order normally (as distinguished from a suspended order batch, which you can process normally by accepting the batch).

By purging the orders in suspended or error status from the system, you reduce the reserved or backordered items from the orders.

The Purge Suspended Orders menu option purges orders only if they are not part of a batch, and if they were entered before the current date. You can purge orders by date range or select a specific order to purge.

> **Note:**
>
> You cannot use this option to purge a quote.

Purge Suspended Orders Screen

How to display this screen: Enter PSOR in the Fast path field at the top of any menu or select Purge Suspended Orders from a menu.

Field	Description
Enter order#	Enter an order number in this field to purge an order individually, rather than by date range. The order whose number you enter must be in a suspended or error status, not part of an order batch, and not a quote; otherwise, the screen displays an error message. Numeric, 8 positions; optional.

Field	Description
Starting/ending dates	Enter the beginning and ending order entry dates that indicate the period for which you would like to purge orders. in suspended or error status. The starting date you enter must be earlier than or the same as the ending date; also, you cannot enter an ending date that is later than or the same as the current date. Numeric, 6 positions (in user date format); required if you do not enter an order number.

If you are purging by order number: The system purges the order interactively and produces the Rejected Batch Listing.

If you are purging by date range: The system submits the job PURG_SUSP. This job purges all eligible orders within the date range you entered.

As a result of purging the orders, the related inventory information (SKU open, reserved, and Backorder quantities for any items on the orders) are reduced at this time.

Deleted Order table: The job writes a record in the Deleted Order Table for each purged order.

Purging SKUs (MPSK)

Purpose: Use Purge SKUs to remove items or SKUs based on item status from the system, and to print the Purged SKU List.

The system uses the SKU Purge Days (F11) system control value to determine how long an item/SKU must have been inactive (an order has not been entered for the item/SKU) to be eligible for purging. For example, if you define 365 as the SKU purge days, a SKU will be eligible for purging if the last order date on the SKU record is older than one year.

The system will not delete an item/SKU if the following records exist:

- the on hand quantity, On order quantity or Backorder quantity is greater than 0 in the Item Warehouse table (fast path = WWHS)
- an order detail line exists for the item/SKU
- an open or closed purchase order detail line exists for the item/SKU

SKU Purge Screen

How to display this screen: Enter MPSK in the Fast path field at the top of any menu or select Purge SKUs from a menu.

Field	Description
Purge SKUs with no orders for xxx days	The number of days to retain SKUs that are not on any existing order. This number defaults from the SKU Purge Days (F11) system control value. Numeric, 7 positions; display-only.

Field	Description
Select status codes for SKUs to be purged	The item status of the items and SKUs you wish to purge. Item status codes are defined in and validated against Work with Item Status (fast path = WIST). Alphanumeric, five 1 position fields; one field required.
Print only do not update	Indicates whether you wish to purge the items and SKUs that meet the selection criteria or print the SKU Purged List report only. Valid values are: Selected (default) = Print the SKU Purged List only. Unselected = Print the SKU Purged List and purge the items and SKUs that display on the report.

When you select Submit to process the SKU Purge, the system also prints the Purged SKU List, which lists each item/SKU that is available to purge.

The system purges an item that contains SKUs if all of the SKUs are available to purge.

Purge Inventory Transaction History (MITH)

Purpose: Use this option to purge records in the Item Transaction History table that are older than the number of days specified in the Inventory Transaction History Retention Days (A24) system control value.

Purge Inventory Transactions Screen

How to display this screen: Enter MITH in the Fast path field at the top of any menu, or select Purge Inventory Transaction History at a menu.

Completing this screen: This screen indicates the numeric code and description of the company where the records will be purged. Click OK to submit the PURGE_ITH job, which purges the records.

System control value required: If the Inventory Transaction History Retention Days (A24) system control value is blank, the system displays an error message. You need to use this system control value to specify a number of days in order to run the purge.

For more information: For background on inventory transactions, see Display Inventory Transaction History (DITH).

Purge Purchase Order (MPOP)

Purpose: Use this option to purge canceled and/or completed records in the following tables:

- PO Detail
- PO Detail Audit
- PO Detail Estimated Charges
- PO Detail Hold
- PO Detail Messages
- PO Detail Noninventory
- PO Header

- PO Header Audit
- PO Message
- PO Receipt Header
- PO Suspense

Purge dates: Records are eligible for purging if the date they were canceled or received is older than number of days specified in the # of Days Before PO Purge (A58) system control value.

Report: This option also generates the Purchase Order Purge Listing listing the purchase orders deleted through the purge.

Purchase Order Purge Selection Screen

How to display this screen: Enter MPOP in the Fast path field at the top of any menu, or select Purge Purchase Order from a menu.

Completing this screen:

- Select the Purge completed orders flag to delete purchase orders that are completed; otherwise, leave this flag unselected.
- Select the Purge cancelled orders flag to delete purchase orders that are canceled; otherwise, leave this flag unselected.

> **Note:**
>
> You must select either completed or canceled purchase orders for purge at this screen.

- Leave the Purge report field set to Detail (default) to print the Purchase Order Purge Listing with information on purchase order detail lines, or change the setting to Summary to print the summary version.
- Select Accept to submit the PO_PURGE job. This job purges the records based on your screen selections and the setting of the # of Days Before PO Purge (A58) system control value, and generates the Purchase Order Purge Listing.

For more information: For background on purchase orders, see Maintaining Purchase Orders (MPOE) and Purchase Order Inquiry (MPOI).

Purge Empty Item Locations (PITL)

Purpose: Use this option to purge Item Location records that have zero:

- on-hand quantity
- pending transaction quantity
- printed quantity

You need to specify the warehouse where empty item locations should be deleted. In addition, the prompt screen allows you to specify the number of days since placement date. For example, if you specify 45 days, only item locations whose placement dates were more than 45 days ago and which match all the other criteria will be deleted.

Even if the purge deletes the item location record, it is possible that the item/SKU has this warehouse and location identified in the SKU table as the “primary primary” location. The record in the SKU table is not cleared by this purge.

> **Note:**
>
> Ordinarily, the system automatically deletes all item locations when the above quantities are zero, except in the case of primary locations.

Purge Empty Item Locations Screen

How to display this screen: Enter PITL in the Fast path field at the top of any menu, or select Purge Empty Item Locations from a menu.

Completing this screen:

- Enter the 3-position warehouse number where the item locations should be deleted. This entry is required.
- Enter the number of days required since placement date for an item location to be eligible for deletion. For example, if you enter 45, and an empty item location has a placement date of 50 days ago, it is eligible for deletion.
- Select Accept to submit the PURGITL job.

Purge Order Billing History (POBH)

Purpose: Use this option to purge Order Billing History records on or earlier than a specified date.

Purge Order Billing History Screen

How to display this screen: Enter POBH in the Fast path field at the top of any menu, or select Purge Order Billing History from a menu.

Completing this screen:

- Use the Purge transactions up to field to indicate the latest date to purge in the Order Billing History table.
- Select Submit and then click OK at the confirmation window to submit the PURGE_OBH job and generate the Order Billing History Purge report.

> **Note:**
>
> The job is submitted in held status; you will need to release it in order to perform the purge and generate the report.

For more information: For background on Order Billing History, see Order Billing History Detail Screen.

Purge Orders by Order Number (MORP)

Purpose: Use this option to purge individual orders.

Purge an Order Screen

How to display this screen: Enter MORP in the Fast path field at the top of any menu, or select Purge Orders by Order Number from a menu.

Purging an order: Enter the order number to purge and select the Confirm flag to purge the order.

Eligible to purge? The system displays an error message after you select the Confirm flag if the order is ineligible for purge. An order is eligible for purge if it is suspended, canceled, or closed and there are no pending transactions or activity, such as refunds. For example, an order might be ineligible for purge for any of the following reasons:

- Order Header not found (Indicates that the order number you entered does not exist.)
- Open R/A for order
- Order Status is Open
- Open refund for order
- Order status is Held
- Order status is Quote
- Order status is Error

The purge request might also fail if there is a communication issue with EFTConnect, preventing the order purge because payment-related data for the order cannot be purged.

Updates: If the order is eligible to purge, the system deletes the Order Header and records in all related tables, and displays a message indicating that the order has been purged. See Order-Related Tables for a list. It also writes a record in the Deleted Order Table. The Process indicated is Individual Order Purge.

Purging suspended orders: You can also use the Purging Suspended Orders (PSOR) option to purge suspended orders.

Purging all eligible orders: See Purging Orders (MPOR) for information on submitting a job to purge all eligible orders.

Flexible Payment Options

Topics in this part:

- Deferred/Installment Billing Overview provides an overview of how flexible payment options work.
- Deferred/Installment Billing Setup describes the steps necessary to set up deferred or installment billing pay plans.

- Working with Flexible Payment Options (WFPO) describes the screens you use in the Work with Flexible Payment Options menu option.
- Credit Card Net Exchange Billing describes the process the system uses to net credit invoices with debit invoices before a deposit is sent to the service bureau for an invoice associated with an exchange.

> **Important:**
>
> There is a known issue with deferred/installment billing functionality when processing a return. If you plan to use deferred/installment billing, contact customer support to determine if your planned use of this functionality will be impacted by this issue.

Working with Flexible Payment Options (WFPO)

Purpose: Use the Work with Flexible Payment Options menu option to set up and work with deferred or installment pay plans. This menu option also allows you to review a pay plan's order and shipment history.

> **Note:**
>
> Only credit cards (as opposed to different types such as stored value card or debit card) are eligible for deferred or installment billing. If you accept any other credit card type besides a regular credit card, you should make the Pay type one of the Qualification Values for each payment plan you create to prevent these other credit card types from being accepted. You can use the Copy option at the Work with Flexible Payment Option Screen to make a copy of the payment plan for each eligible credit card pay type.

EXC flexible payment option: The system creates the EXC Net Billing for Exchanges flexible payment option for use during Credit Card Net Exchange Billing if the Use CC Net Exchange Billing (M23) system control value is selected. You cannot change or delete this flexible payment option, and you cannot use this flexible payment option for deferred/installment billing. See Credit Card Net Exchange Billing for processing details.

For more information:

- An overview of how pay plans work: Deferred/Installment Billing Overview
- Setting up your company if you will be using pay plans: Deferred/Installment Billing Setup

In this topic:

- Work with Flexible Payment Option Screen
- Create Flexible Payment Option Screen
- Display Payment Option History Screen

Work with Flexible Payment Option Screen

How to display this screen: Enter WFPO in the *Fast path* field at the top of any menu, or select Work with Flexible Payment Option from a menu.

Field	Description
Code	The code representing a deferred or installment pay plan. **EXC flexible payment option:** The system delivers the EXC Net Billing for Exchanges flexible payment option to use during Credit Card Net Exchange Billing if the Use CC Net Exchange Billing (M23) system control value is selected. You cannot change or delete the EXC flexible payment option; however, if this flexible payment option exists and then you deselect the system control value, this flexible payment option is automatically deleted. Credit Card Net Exchange Billing for processing details. Alphanumeric, 5 positions; optional.
Type	The type of pay plan. Valid values are: D = deferred billing I = installment Alphanumeric, 1 position; optional.
Description	The description of the pay plan. Alphanumeric, 40 positions; optional.
Start date	The date when the pay plan first becomes available to apply to orders. Does not apply to the EXC flexible payment option. Numeric, 6 positions (in user date format); display-only.
End date	The date when the pay plan is no longer available to apply to orders. Does not apply to the EXC flexible payment option. Numeric, 6 positions (in user date format); display-only).

Select Option	Procedure
Create a new pay plan	Select Create to advance to the Create Flexible Payment Option Screen.
Change a pay plan	Select Change for a pay plan to advance to the Change Flexible Payment Option Screen. At this screen, you can change any fields but the Payment code. See the Create Flexible Payment Option Screen for field descriptions. **Note:** You cannot change the EXC Net Billing for Exchanges flexible payment option; see Credit Card Net Exchange Billing for processing details and more information.
Delete a pay plan	Select Delete for a pay plan to display the Delete Confirmation prompt. You can delete a pay plan only if it is not used on any orders currently in your company. **Note:** You cannot delete the EXC Net Billing for Exchanges flexible payment option; see Credit Card Net Exchange Billing for processing details and more information.
Display a pay plan	Select Display for a pay plan to advance to the Display Flexible Payment Option Screen. You cannot change any information at this screen. See the Create Flexible Payment Option Screen for field descriptions.

Select Option	Procedure
Display history for a pay plan	Select History for a pay plan to advance to the Display Payment Option History Screen.

Create Flexible Payment Option Screen

Purpose: Use this screen to create a new pay plan.

How to display this screen: Select Create at the Work with Flexible Payment Option Screen.

Field	Description
FPO payment code	The code to identify the deferred or installment pay plan. Alphanumeric, 5 positions. Create screen: required. Change screen: display-only.
Description	The description of the deferred or installment pay plan. Alphanumeric, 40 positions; required.
Type	The type of pay plan. Valid values are: Deferred = Defer depositing the amount the customer owes for an order shipment for a specified period of time or until a specific date. Installment = Deposit the amount the customer owes for an order shipment in a specified number of equal installments. Required.
Start (Start date)	The first date when new orders will be eligible for the pay plan. When evaluating whether an order is eligible for a pay plan, the system checks the original order date, even if you are attempting to add a pay plan in order maintenance on a later date. Example: 7/25: You enter an order for an item that is currently backordered. 8/20: The customer calls to request a pay plan. The pay plan start date is 8/15. Result: The order is ineligible for the pay plan based on the pay plan start date (8/15) and order date (7/25). This date must be earlier than or the same as the end date. Numeric, 6 positions (in user date format); required.
End (End date)	The date when new orders will no longer be eligible for the pay plan. Eligibility is based on the original order date, not the current date, when you add a pay plan in order maintenance. Example: 7/25: You enter an order for an item that is currently backordered. 8/20: The customer calls to request a pay plan. The pay plan end date is 7/31. Result: The order is eligible for the pay plan based on the pay plan end date (7/31) and order date (7/25). This date must be later than or the same as the start date. Numeric, 6 positions (in user date format); required.

Field	Description
Expiration date	The date when you will no longer defer processing deposits for the pay plan. Example: 7/25: You enter an order for deferral of payment for 60 days based on invoice date. The item is currently backordered. The pay plan has an ending date of 7/31, and an expiration date of9/30. 8/15: You ship and bill the order. Result: Since the deferred date (60 days past the invoice date of 8/15, or 10/14) would be past the expiration date of 9/30, the deposit will not be deferred, but will be available for processing immediately. The system determines when the pay plan has expired as follows: Deferral: You can enter an expiration date only if you use the # of days for deferral field rather than the *Fixed deferral date.* To determine whether to apply the deferral, the system adds the number of days for deferral to the order's invoice date (if the Based on field is set to I) or the order date (if the Based on field is set to O). If the result is later than the Expiration date, the deposit is not deferred and is eligible for processing immediately after billing. You cannot enter an expiration date that is sooner than the pay plan End date; otherwise, the following error message indicates: Invalid Expiration Date Installment: To determine whether to apply the installment, the system compares the order's invoice date with the expiration date. If the Invoice date is later than or the same as the Expiration date, the deposit is not broken out into installments, but the entire amount is eligible for processing immediately after billing. Numeric, 6 positions (in user date format); required unless you enter a Fixed deferral date for a deferral pay plan.
View in OE/OM	This field indicates whether this pay play displays in order entry or order maintenance when you prompt (click on the arrow) in the pay plan field. You can still apply the pay plan by typing in the code, even if it does not display; also, the plan can be auto-applied regardless of whether it is viewable. Valid values are: Selected = pay plan is viewable in order entry/maintenance Unselected = pay plan is not viewable in order entry/ maintenance
Restrict to entity	Enter an entity code in this field to restrict the pay plan to orders whose source code points to this entity. The source code is associated with an entity through its division. The source code on the order header determines the entity. Leave this field blank to make orders eligible for the pay plan regardless of entity. Entity codes are defined in and validated against the Entity table. See Working with Entities (WENT) and Working with Flexible Payment Options (WFPO). Numeric, 3 positions; optional.

Field	Description
Auth full amount (Authorize full amount)	This field indicates whether to authorize the full pickable amount of the order when generating the initial authorization at pick slip generation. Valid values are: Selected = authorize full pickable amount Unselected = do not authorize full pickable amount. If you deselect this field, the amount authorized at pick slip generation is: Deferred**:** $1.00 is authorized at pick slip generation. Installment**:** The amount of the first installment is authorized at pick slip generation. See Processing Auto Deposits (SDEP) for an overview of the authorization process for pay plan orders.
Merchant ID message	A short message to pass to the deposit service. This message appears on the customer's credit card statement. The message is concatenated with additional information into a 14- or 18-position message, formatted as follows: DBA industry code (3 positions): taken from the first 3 positions of the *Industry format code* for the authorization service Merchant ID message (11 positions) Installment description (4 positions): for installment pay plans, this consists of a description of which installment was deposited, for example, 1of 4. With this description, the entire message for an installment plan is 18 positions. For deferred pay plans, the entire message ends after the merchant ID message, producing a 14-position message. Alphanumeric, 11 positions; optional.
Ship complete	This field indicates whether to override the Ship complete flag setting on an order that uses this pay plan to selected. You might use this field to prevent pay plan orders from having multiple invoice dates, thus multiplying the number of deposits. Example: If an order uses a pay plan of four installments, and you fulfill the order in three separate shipments because of backorders, you would need to process 12 deposits to complete the pay plan. Valid values are: Selected = force orders with this pay plan to ship complete Unselected = do not force orders with this pay plan to ship complete You might also select the Consolidated Invoice (B49) system control value to simplify pay plan processing; see Deferred/ Installment Billing Setup. **Note:** In Order Management System 21.0 or higher, or Order Administration, you cannot select the Consolidated Invoice system control value if it is not already selected. If the system control value is currently selected (set to Y) and you deselect it (change it to N or blank), you cannot then change it back to selected. The option to consolidate invoices will be removed at a later date.

Field	Description
Display summary	This field controls whether the Display Payment Plan Summary Screen displays automatically when you add this payment plan to an order. This screen includes projected deposit dates and amounts for the order. Valid values are: Selected = display the summary screen Unselected = do not display the summary screen You can also display the summary screen in order entry by selecting Pay Plan Summary for the pay type at the Enter Payment Method Screen.
Auto apply	This field indicates the method the system should use when determining which pay plan(s) apply to an order in order entry. Valid values are: Auto apply = apply this pay plan to an order if the order qualifies, without prompting the operator. If a pay plan is set to apply automatically, it overrides the regular hierarchy of pay plan selection. No auto apply = apply this pay plan to a qualifying order only when the operator selects it. Prompt = force a window to pop up in order entry displaying all available pay plans if the order qualifies for the pay plan. You should select the *View in OE/OM* field if you set this field to 3. **Note:** To simplify pay plan selection in order entry, you should use the same setting in this field for all of your pay plans. See Assigning a Payment Plan to the Order for a discussion of how the system determines which pay plan(s) an order qualifies for. Numeric, 1 position; required.
Validate CC expiration date	This field is not currently implemented.
Pick message	Three lines of message text to appear on the pick slip. Messages appear only if your pick slip printing program supports them. Alphanumeric, 60 positions each; optional.
Use the following fields to set up a deferral pay plan:	
# of days for deferral	This field indicates the number of days to defer processing the deposit for a shipment. If you enter a number in this field, you must also specify whether to base the calculation on order date or invoice date; see the field description below. Example: No payments for 60 days from shipment. You can also base a deferral on a fixed date; see *Fixed deferral date*, below. You cannot use this field for an installment pay plan. Numeric, 3 positions; required for a deferral pay plan if you do not enter a fixed date.

Field	Description
Based on	This field indicates whether to base the deferral interval on the date you enter the order, or the date you ship and bill it. Valid values are: Order Dt = base deferral on original order date. If you base the deferral on original order date, it is possible for the deposit to be eligible for processing immediately after billing. For example, if you defer payment for 30 days from order date, and you do not ship for 30 days or more after the order date, the deposit will be eligible for processing immediately. Invoice Dt = base deferral on invoice (billing) date. The system uses this field to calculate the deposit date only for deferred pay plans that use the # of days for deferral to calculate deposit date. You cannot use this field for an installment pay plan. Required for a deferral pay plan if you enter a # of days for deferral.
Fixed deferral date	This field indicates the fixed date to use for a deferral pay plan. If you select a fixed deferral date for a pay plan, all orders using this pay plan will be eligible for deposit on this date regardless of when they are entered or billed. Example: No payment till February 1 when you order from our holiday book. If you complete this field, you cannot complete the # of days for deferral or Based on fields. Also, you cannot use this field for an installment pay plan. Numeric, 6 positions (in user date format); required for a deferral pay plan if you do not enter a # of days for deferral.
Use the following fields to set up an installment pay plan:	
# of installments (Number of installments)	The number of installments required to pay off the invoice balance. Example: Four easy payments. The system divides the invoice total into this number of equal installments. If the total does not divide equally, the last installment(s) will include the additional balance. You must complete either the Interval or the Fixed installment day field to indicate when the installments will be due. You cannot use this field for a deferral pay plan. Numeric, 2 positions; required for an installment pay plan.
Interval	The number of days between installments. The shortest interval you can set is 30 days. The installment date is based on the date you bill the shipment. Example: Set this field to 30 and the *# of installments* to 3 to have deposits eligible for processing 30, 60, and 90 days after billing. You can also base the installment dates on a fixed day of the month; see *Fixed installment day* below. You cannot use this field for a deferral pay plan. Numeric, 3 positions; required for an installment pay plan if you do not complete the Fixed installment day.

Field	Description
Fixed installment day	The day of the month to process the deposits for an installment pay plan. The first deposit is eligible for processing on the first occurrence of this date after shipment. Example: If you set this field to 15, and you confirm shipment of the order on any date from August 16 to September 15, the deposit will be eligible for processing on September 15. You can also base the installment dates on a number of days between installments; see *Interval* above. You cannot use this field for a deferral pay plan. Numeric, 2 positions; required for an installment pay plan if you do not complete the Interval field.
Use the following fields to restrict orders which can use the pay plan. An order must meet ***all* of the specified criteria for the pay plan to qualify:**	
Offer	Enter an offer code to restrict the pay plan to orders for this offer. The offer is based on the source code on the order header. If you leave this field blank, the pay plan will not be restricted by offer. Offer codes are defined in and validated against the Offer table; see Working with Offers (WOFR). Alphanumeric, 3 positions; optional.
Minimum amt (Minimum amount)	Enter a minimum order merchandise total to restrict the pay plan to orders who meet or exceed this total. For a multi-recipient order, the merchandise total against all recipients is compared with this minimum to determine eligibility. If you leave this field blank, the pay plan will not be restricted by merchandise total. Numeric, 13 positions with a 2-place decimal; optional.
Pay type	Enter a pay type code to restrict the pay plan to orders that use this pay type. If you leave this field blank, the pay plan will not be restricted by pay type. Pay type codes are defined in and validated against the Pay Type table; see Working with Pay Types (WPAY). Numeric, 2 positions; optional.
Item	Enter an item code to restrict the pay plan to orders that include this item. The order can also include additional items. You can enter the base item code only. If the item has SKUs, you cannot restrict the pay plan to specific SKUs. If you leave this field blank, the pay plan will not be restricted by item. Item codes are defined in and validated against the Item table; see Performing Initial Item Entry (MITM). Alphanumeric, 12 positions; optional.

Display Payment Option History Screen

Purpose: Use this screen to review order activity history for a pay plan.

How to display this screen: Select History for a pay plan at the Work with Flexible Payment Option Screen.

> **Note:**
>
> The Update Demand for Order Maintenance Transactions (C72) system control value controls when several of these fields update.

Field	Description
Code	The code representing a deferred or installment pay plan. Alphanumeric, 5 positions; display-only.
Type	The type of pay plan. Valid values are: D = deferred billing I = installment Alphanumeric, 1 position; display-only.
Description	The description of the pay plan. Alphanumeric, 40 positions; optional.
Start date	The date when the pay plan first becomes available to apply to orders. Numeric, 6 positions (in user date format); display-only.
End date	The date when the pay plan is no longer available to apply to orders. Numeric, 6 positions (in user date format); display-only).
# of orders	The total number of orders for the pay plan. This total increases when you: • enter an order for the pay plan • change an order to this pay plan in order maintenance, if the Update Demand for Order Maintenance Transactions (C72) system control value is selected This total decreases when you cancel an item and use a cancel reason whose Reduce demand? field is unselected. See Establishing Cancel Reason Codes (WCNR). Numeric, 7 positions; display-only.
# of shipments	The total number of shipments made for this pay plan. This total increases when you confirm shipments for any orders using the pay plan, including orders that were not originally entered for the pay plan and were changed in order maintenance. Numeric, 7 positions; display-only.

Field	Description
$ ordered (Dollars ordered)	The dollar merchandise total, excluding any order charges such as freight, tax, and handling, of all orders entered for the pay plan. This total increases when you: • enter an order for the pay plan • change an order to use this pay plan in order maintenance, if the Update Demand for Order Maintenance Transactions (C72) system control value is selected • add an item in order maintenance if the Update Demand for Order Maintenance Transactions (C72) system control value is selected This total decreases when you cancel an item and use a cancel reason whose Reduce demand*?* field is unselected. See Establishing Cancel Reason Codes (WCNR). Numeric, 13 positions with a 2-place decimal; display-only.
$ shipped (Dollars shipped)	The dollar merchandise total, excluding additional order charges such as freight, tax, and handling, of shipments made for the pay plan. This total increases when you confirm shipments for any orders using the pay plan, including orders that were not originally entered for the pay plan and were changed in order maintenance. Numeric, 13 positions with a 2-place decimal; display-only.
# of cancels	The total number of items or orders canceled for the pay plan. This total increases when you process a cancellation for any orders using the pay plan, including orders that were not originally entered for the pay plan and were changed in order maintenance, through: • order maintenance • Working with Backorders Pending Cancellation (WBPC) Orders you cancel due to credit card decline through Working with Credit Card Cancellations (WCCC) do not update this total. Numeric, 7 positions; display-only.
# of returns	The total number of items or orders returned or exchanged for the pay plan. This total increases when you process a return or exchange for an order with the pay plan, including orders that were not originally entered for the pay plan and were changed in order maintenance. Numeric, 7 positions; display-only.
$ cancelled (Dollars canceled)	The dollar merchandise total, excluding additional order charges such as freight, tax, and handling, of cancellations made for the pay plan. This total increases when you process any sort of cancellation for an order using the pay plan, including orders that were not originally entered for the pay plan and were changed in order maintenance, through: • order maintenance • Working with Backorders Pending Cancellation (WBPC) Orders you cancel due to credit card decline through Working with Credit Card Cancellations (WCCC) do not update this total. Numeric, 13 positions with a 2-place decimal; display-only.
$ returned (Dollars returned)	The dollar merchandise total, excluding additional order charges such as freight, tax, and handling, of returns or exchanges made for the pay plan. This total increases when you process any sort of return or exchange for an order using the pay plan, including orders that were not originally entered for the pay plan and were changed in order maintenance. Numeric, 13 positions with a 2-place decimal; display-only.

Field	Description
# of sold outs	The total number of items or orders sold out for the pay plan. This total increases when sell out an item on an order with the pay plan, including orders that were not originally entered for the pay plan and were changed in order maintenance, through selecting Sell Out for the item in order entry or order maintenance or Processing Auto Soldout Cancellations (MASO). Numeric, 7 positions; display-only.
$ sold out (Dollars sold out)	The dollar merchandise total, excluding additional order charges such as freight, tax, and handling, of sellouts made for the pay plan. This total increases when you process any sort of sellout for an order using the pay plan, including orders that were not originally entered for the pay plan and were changed in order maintenance, through • selecting Sell Out for the item in order entry or order maintenance • Processing Auto Soldout Cancellations (MASO) Numeric, 13 positions with a 2-place decimal; display-only.

Processing Deposits

Topics in this part:

- Processing Auto Deposits (SDEP) describes the Submit Auto Deposits menu option.
- Manage Rejected Deposits in Modern View describes how to review and work with rejected or unconfirmed deposits.
- Printing the Deposit History Summary (PDHS) describes how to print a report summarizing credit card deposits by date.
- Printing the Credit Card Deposit Schedule (PCCD) describes how to print a report listing the your projected deposits for deferred or installment billing pay plans.
- Printing the Pending Payment Plan Deposits Report (PPPD) describes how to print a report listing future deferred or installment deposits by order and invoice number.
- Printing the Deposit History Detail Report (PDHD) describes how to print a report listing deposits processed during a specific date range. Within this date range, you can select to include only deposits for a specific authorization service, pay type, and status.

Processing Auto Deposits (SDEP)

Purpose: Use the Submit Auto Deposits function to:

- transmit credit card invoice information to a deposit service once you have shipped and billed the orders.
- transmit credit card credit information once you have processed returns or credits.

When you process deposits for deferred or installment pay plan orders, there is typically an interval between the time you bill the orders and the time you process the deposit(s), based on the pay plan agreement; see Deferred or Installment Pay Plans vs. Regular (Non-Pay Plan) Orders.

Suppressing deposits: You can suppress deposit processing for orders you receive through the *Generic Order Interface (Order API)*. In this situation, the order is not included when you process deposits. See *Suppressing Deposits and Refunds* for an overview.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Tracking records evaluated and processed: The DEP_UPDATE (deposits) job tracks the total number of records and evaluated in the Job History table. See Display Job History (DJHY) for background.

In this topic:

- Deposit Setup
  - Scheduling Deposits
  - Multi-Currency, Alternate Currency, and Prestige Process
- Auto Deposit Screen
- Select Auth Service for Deposit Screen
- Processing Deposits
  - Preload Deposits?
  - Sending Deposits
  - Batch Deposit Updates
  - Foreign Currency Deposit Process (Prestige)
  - Void Unused Authorization After Initial Deposit
  - Capture Sequence and Count Sent to CyberSource
  - Multiple Capture Sequence and Final Capture Sent to External Payment Service
- Deferred or Installment Pay Plans vs. Regular (Non-Pay Plan) Orders
  - Deposit Release Date
  - Authorizing Deposits
  - Force Deposit
  - Netting Credits for Pay Plan Orders
  - Merchant ID Messages
  - Updates for Installment Pay Plans
  - Rejected Deposits for Pay Plan Orders
  - Holding Pay Plan Orders
- Stored Value Card Deposits
- Reviewing Deposits in Order Inquiry
- Unconfirmed Deposits Listing Report
- Auto Deposit Confirmation Report

Deposit Setup

In order to send information to a deposit service with the Submit Auto Deposits function, you must first:

- Define the deposit service using the Defining Authorization Services (WASV) menu option.

- Select the deposit service for each credit card payment type in the Working with Pay Types (WPAY) menu option.
- Pick, ship, confirm and bill the orders; see Performing Pick Slip Generation and Confirming and Billing Shipments.
- For refunds, you must first process the credit card credits with the Processing Refunds (MREF) menu option.

Increasing maximum threads: To enhance the performance of deposit processing, if needed, set the DEPOSIT_MAX_THREADS property in Working with Admin Properties (CPRP) to a higher number. You can enter any positive integer. This property defaults to 1.

For more information:

- Processing Deposits for the steps the system performs to process deposits.
- defining a deposit service: Defining Authorization Services (WASV)
- setting up deferred or installment pay plans: Deferred/Installment Billing Overview
- purging the Credit Card Deposit Prestige table: Purging Prestige Credit Card Deposits (MPSP)
- defining payment types: Working with Pay Types (WPAY)
- defining currency codes: Working with Currency (WCUR)
- defining country codes: Setting Up the Country Table (WCTY)
- processing refunds: Processing Refunds (MREF)
- working with Order Entry or General Usage system control values: Setting Up Order Entry Values and Setting Up General Usage Values

Scheduling Deposits

You can use the SCHDDEP periodic function (program name PFR0090) to send deposits. See Scheduling Jobs for an overview and setup information.

The Parameter field allows you to generate deposit transactions for a specific authorization service and/or define the maximum number of deposits to process for purchases. Note that this setting does not apply to refund transactions.

> **Note:**
>
> You can define a Purchases transactions to generate number in the Parameter field only if the Preload Deposits (L78) system control value is unselected.

If you do not define any parameters, the system uses the same settings as if you used the Auto Deposit Screen with all the default settings selected.

You need to specify a company when you set up the periodic process.

When you run the periodic process or submit deposits through the Submit Auto Deposits (SDEP) option, it starts a job named **AUTO_DEP123**, where 123 is the company number. The job selects records from the Invoice Payment Method table that have not yet been processed for deposit or credit, and whose deposit release date is the current date or earlier. The periodic process continues to run into the AUTO_DEP job finishes.

You can review the submitted AUTO_DEP job at the Job Management Screen. See Processing Deposits for more information

Additional things to note about the SCHDDEP function:

- To run the function for multiple companies at the same time, you can select a different job queue for each periodic process that includes the SCHDDEP periodic function.
- Each instance of the job creates its own active procedure, displayed in Purge Active Procedures Across Users (MACX) with a Type of **BD**.
- If the AUTO_DEP job is inactive for 15 minutes but the active procedure still exists, you can use the JOBCLN periodic function to delete the active procedure, and then you can restart the job.
- You cannot currently delete the AUTO_DEP job after it goes into Finished or Error status at the Job Management Screen screen. Also, job history records for this job are not purged based on the oms.job.history.purge.retain.days specified in Working with Admin Properties (CPRP).
- The Display Active Batch Jobs (DABJ) option does not display the Last Program for the SCHDDEP job.

Multi-Currency, Alternate Currency, and Prestige Process

The following system control values govern the way your company handles foreign currencies when you process deposits.

System Control Value	Description
Multi-Currency	Select the Multi Currency by Offer (E03) system control value to segregate orders based on the currency associated with the offer. If you use multi currency by offer, you will be required to specify currency at many points throughout the system, such as when you process refunds or print various reports. If you have this system control value selected, you do not need to have the Track Invoice Currency (D68) field selected, unless you also want to use the Invoice Currency table to record the exchange rate when an order bills; however, this is necessary only if you use Prestige as a deposit service.

System Control Value	Description
Prestige Process	Select the Track Invoice Currency (D68) system control value to use the separate deposit process for foreign currency (the "Prestige" process) described below. The customer's currency is determined by the country where he or she resides. If you are processing deposits in foreign currencies separately, and you want to track the currency exchange rates at the time of (Prestige) billing, you may also need to: • Select the Track Invoice Currency (D68) system control value to track the currency conversion rate at the time of billing. • Define a deposit service with a code of PRE in the Defining Authorization Services (WASV) menu option. • In the Working with Pay Types (WPAY) menu option, select the PRE deposit service for any foreign credit card payment type to be processed separately. • Define a country code in the Setting Up the Country Table (WCTY) menu option that is identical to the currency code in the Currency table; for example, both the Country and Currency codes for Japan might be defined as JPN. • When you enter orders in the foreign currency, use the foreign credit card payment type, make sure you are using the foreign Country code, and use ** for the state in the customer's address. Foreign currency transactions that use the separate process are not confirmed interactively through Process Auto Deposits. Instead, the system writes these records to the Credit Card Deposit Prestige table (CCCDPP). You must extract the contents of this table for transmission to the deposit service. Periodically, you must also purge the contents of this table through Purging Prestige Credit Card Deposits (MPSP).

Auto Deposit Screen

Purpose: Use this screen to send and receive deposit and credit card credit information to and from a deposit service.

Selecting service bureaus for deposit: Select the Select Auth Service option to advance to the Select Auth Service for Deposit Screen, where you can select the service bureau(s) for which you wish to run deposits. By default, all service bureaus are selected for deposit.

Types of transactions selected: All eligible transactions, regardless of whether they are for orders with deferred or installment pay plans or for regular (non-pay plan) orders, will be processed. See Deferred or Installment Pay Plans vs. Regular (Non-Pay Plan) Orders for more information on pay plans.

How to display this screen: Enter SDEP in the Fast path field at the top of any menu or select Submit Auto Deposit from a menu.

> **Note:**
>
> **Important:** You will receive an error message when you try to advance to the Auto Deposit screen if the Use Auto Authorization Interface (C14) system control value is not selected: Info: Auto Authorization is not currently enabled. This system control value must be selected in order to send deposits to the service bureau for confirmation.

Field	Description
Send or receive	Send Deposits is selected by default, specifying that you are sending information to the deposit service for settlement. You cannot change this option. Required.
Purchases	Use these fields to indicate the number or dollar amount of purchases to process. **Note:** The Purchases fields are display only if the Preload Deposits (L78) system control value is selected.
Transactions to generate (for purchases)	Enter the maximum number of deposits to process for purchases. Each transaction represents an invoice for a shipment or an installment payment using a credit card. Selecting transactions: If you enter a number, the system selects transactions for the service bureau(s) selected for deposit in ascending numeric order (lowest to highest) by order number, then invoice number, until it reaches the number of transactions you specify. See the description of the Amount to generate field, below, for more information on how the system selects transactions. Deposit release date: The transaction must have a deposit release date earlier than or the same as today's date to be eligible for processing. See Deposit Release Date. Leave this field blank to process all eligible deposits for purchases. Numeric, 7 positions; display-only if Preload Deposits (L78) is selected, otherwise, optional.

Field	Description
Amount to generate (for purchases)	Enter the maximum total dollar amount of all deposits to process for purchases. Selecting transactions: If you enter an amount, the system continues selecting transactions for the service bureau(s) selected for deposit in ascending order number sequence as described above, and stops before it would exceed this amount. However, if it would exceed the maximum amount by selecting the orders in exact sequence, it will skip one or more orders as necessary. Example: You enter a maximum amount to generate of $100 The following orders are currently eligible for deposit: order # / amount 100 / $50 101 / $30 102 / $30 103 / $15 104 / $10 Result: The system selects orders 100,101, and 103 for deposit. It skips order 102 because its order total of $30 would cause the total amount to exceed the maximum of $100 ($50 + $30 +$30 = $110). Also, it stops after including order 103, because it cannot add another order without exceeding the maximum. If you complete both this field and the Transactions to generate field, the system will restrict the deposits processed to within both limits. Leave this field blank to process deposits regardless of the total dollar amount. Numeric, 13 positions with a 2-place decimal; display-only if Preload Deposits (L78) is selected, otherwise, optional.
Returns	Use these fields to indicate the number or dollar amount of return credits to process:
Transactions to generate (for returns)	Enter the maximum number of deposits to process for returns. Each transaction represents a credit invoice to process against the customer's credit card. Selecting transactions: If you enter a number, the system selects transactions for the service bureau(s) selected for deposit in ascending numeric order (lowest to highest) by order number, then invoice number, until it reaches the number of transactions you specify. See the description of the Amount to generate field, below, for more information on how the system selects transactions. Deposit release date: The transaction must have a deposit release date earlier than or the same as today's date to be eligible for processing. See Deposit Release Date. Leave this field blank to process all eligible deposits for returns. See Netting Credits for Pay Plan Orders. Numeric, 7 positions; optional.

Field	Description
Amount to generate	Enter the maximum total dollar amount of all credit transactions to process. Selecting transactions: If you enter an amount, the system continues selecting transactions for the service bureau(s) selected for deposit in ascending order number sequence as described above, and stops before it exceeds this amount. Example: You enter a maximum amount to generate of $100 The following returns are currently eligible for credit deposit processing: order # / amount 100 / $50- 101 / $30- 102 / $30- Result: The system selects orders 100 and 101 for credit deposit. Then it stops after including order 103, because it cannot add another order without exceeding the maximum. If you complete both this field and the Transactions to generate field, the system will restrict the credit deposits processed to within both limits. Leave this field blank to process credit deposits regardless of the total dollar amount. Numeric, 13 positions with a 2-place decimal; optional.

Screen Option	Procedure
Select which service bureau(s) you wish to select for the deposit run	Select Select Auth Service to advance to the Select Auth Service for Deposit Screen, where you can select the service bureau(s) for which you wish to run deposits. By default, all service bureaus are selected for deposit.
Send deposits to a deposit service	Select OK at the Auto Deposit Screen to start a job named **AUTO_DEP123**, where 123 is the company number. This job selects records from the Invoice Payment Method table for the service bureau(s) selected for deposit that have not yet been processed for deposit or credit, and whose deposit release date is the current date or earlier.. You can review the submitted AUTO_DEP job at the Job Management Screen. See Processing Deposits for more information. Once you submit the deposit run, the system updates the Selected field for each service bureau on the Select Auth Service for Deposit Screen to YES, indicating all service bureaus are selected for the next deposit run, unless you deselect them.

Select Auth Service for Deposit Screen

Use this screen to select the service bureau(s) for which you wish to run deposits. By default, all service bureaus are selected for deposit.

Once you run deposits, the system updates the Selected field on this screen to YES, indicating all service bureaus are selected for the next deposit run, unless you deselect them.

How to display this screen: Select Select Auth Service on the Auto Deposit Screen.

Field	Description
Description	The name of a service bureau in Defining Authorization Services (WASV). Authorization services are defined in and validated against the Authorization Services table. Enter a valid description and select OK to display the service bureau that matches your entry. Selecting and Unselecting a Service Bureau When you first advance to this screen, all service bureaus are selected for the next deposit run. • Select a service bureau whose Sel field is YES to remove the service bureau from the deposit run; the Sel field updates to NO. • Select a service bureau whose Sel field is NO to add the service bureau to the deposit run; the Sel field updates to YES. Alphanumeric, 30 positions; optional.
Sel Selected?	Indicates whether the service bureau is selected for the deposit run. • YES = The system includes the service bureau in the next deposit run. • NO = The system does not include the service bureau in the next deposit run.

Processing Deposits

The system creates records in the Invoice Payment Method table when you bill the orders and uses the Invoice Payment Method table to create records in the CC Deposit Transaction table to be used by the deposit process.

> **Note:**
>
> The system creates a record in the CC Deposit Transaction table only for pay types that have a deposit service defined.

Preload Deposits?

The setting of the Preload Deposits (L78) system control value determines whether billing or deposits creates records in the CC Deposit Transaction table and CC Deposit History table, based on the records in the Invoice Payment Method table.

Preload Deposit Process

If the Preload Deposits (L78) system control value is selected, billing creates records in the CC Deposit Transaction table and CC Deposit History table immediately after creating records in the Invoice Payment Method table.

In addition:

- If you use Customer Engagement Stored Value Card Integration, PayPal Direct Connection Integration, EFTConnect, or the External Payment Service, the system sends the deposit transaction to the service bureau during billing. You still need to use Processing Auto Deposits (SDEP) to process credit deposits and perform the Batch Deposit Updates. Also, you will need to use the Manage Rejected Deposits Modern View menu option to resubmit any deposits that were not completely processed during billing and deposits.
- For all other service bureaus, the system sends the deposit transaction to the service bureau when you submit deposits using the Processing Auto Deposits (SDEP) menu option.

> **Note:**
>
> - The system does not perform preload deposit processing for the deposit service defined in the Deposit Service for Conditional Deposits (L13) system control value. In this situation, the system uses the regular deposit process.
> - If you select the Preload Deposits (L78) system control value, you cannot use Consolidated Invoice (B49).

> **Important:**
>
> In Order Management System 21.0 or higher, or Order Administration, you cannot select the Consolidated Invoice system control value if it is not already selected. If the system control value is currently selected (set to Y) and you deselect it (change it to N or blank), you cannot then change it back to selected. The option to consolidate invoices will be removed at a later date.

Regular Deposit Process

If the Preload Deposits (L78) system control value is unselected, the deposit process creates records in the CC Deposit Transaction table and CC Deposit History table, prior to sending out the deposit transactions.

CC Deposit Transaction Table

<table>
<tr><th>Preload Deposits (L78) selected</th><th>Preload Deposits (L78) unselected</th></tr>
<tr><td>Oracle Retail Customer Engagement Service Bureau, PayPal Direct Connection, EFTConnect or External Payment Service
During billing:
the system sends the debit deposit transaction to the service bureau.
When an approved response is received, the system updates the Status of the CC Deposit Transaction record to *RCVD, and the Vendor response 1, Vendor response 2, and Authorization code based on the response received from the service bureau.
During deposits:
The system processes any credit deposit transactions.
The system processes Batch Deposit Updates for any credit deposit transactions and any debit deposit transactions that were sent to the service bureau during billing.
Once all updates are complete, the system deletes the CC Deposit Transaction record.
Any Other Service Bureau
During billing:
The Status is *RDY, indicating the deposit transaction is ready to be submitted for processing.
During deposits:
The system sends the deposit transaction to the service bureau and processes Batch Deposit Updates when a response is received.
Once all updates are complete, the system deletes the CC Deposit Transaction record.</td><td>All Service Bureaus
During billing:
The system does not create a record in the CC Deposit Transaction table.
During deposits:
The system sends the deposit transaction to the service bureau.
When an approved response is received, the system updates the Status of the CC Deposit Transaction record to *RCVD, and the Vendor response 1, Vendor response 2, and Authorization code based on the response received from the service bureau.
The system processes Batch Deposit Updates.
Once all updates are complete, the system deletes the CC Deposit Transaction record.</td></tr>
</table>

CC Deposit History Table

Preload Deposits (L78) selected	Preload Deposits (L78) unselected
All Service Bureaus During billing: • Updates Deposit date with the deposit transaction date. • Updates Deposit status to Net yet sent. During deposits: Updates Deposit status to C Confirmed.	All Service Bureaus The system does not create a record in the CC Deposit History table. During deposits: The system creates a record in the CC Deposit History table, based on the information in the Invoice Payment Method and CC Deposit Transaction tables.

Sending Deposits

The system transmits each record to the deposit service specified in the Pay Type table and confirms each deposit when the confirmation is received interactively from the deposit service.

Once the system receives the deposit response from the deposit service and updates the CC Deposit Transaction table, in order to free up the PICKGEN job queue, the system submits the DEP_UPDATE job to the QSYSNOMAX job queue to process the remaining updates; see Batch Deposit Updates.

Credit card encryption: Credit card encryption allows you to encrypt the credit card number in the Order Administration database to provide additional security of credit card data. If you use credit card encryption, the system decrypts the credit card number before sending it to the deposit service. See the Data Security Guide on My Oracle Support (2953017.1) for an overview.

Tokenization: Credit card tokenization allows you to replace the credit card number in the Order Administration database with a token provided by the authorization service. In this situation, the system sends the token rather than the actual credit card number to the deposit service. See Credit Card Tokenization in the Data Security and Encryption Guide on My Oracle Support (2953017.1).

Depositing against multiple authorizations: When you process deposits for an order containing multiple authorizations, the system looks to process the deposit against an unexpired authorization whose amount equals the deposit amount. If an unexpired authorization amount does not equal the deposit amount, the system processes the deposit against the unexpired authorization with the highest dollar amount.

If one of the authorizations for a shipment on the order has expired: If the order includes an authorized shipment and another shipment whose authorization has expired, the expired amount is authorized, and the full amount is deposited.

Example: Item 1 on an order was authorized for 10.00 and the pick slip generated, but the authorization has since expired. A pick slip is generated for item 2 for 15.00, and the amount authorized at this time is 15.00. During deposit processing, the 10.00 is authorized, and 25.00 is deposited.

Credit card net exchange billing: If a credit invoice and debit invoice are flagged for net billing, the system nets the credit invoice amount against the debit invoice amount to determine the remaining amount to deposit; see Credit Card Net Exchange Billing for processing details.

Authorization number: The original authorization number authorizing the shipment at pick slip generation is retained by the system. This is the number that displays in order inquiry for a pay plan order, even after you receive a full authorization for the amount of the deposit.

Maximum threads: To enhance performance, set the DEPOSIT_MAX_THREADS property in Working with Admin Properties (CPRP) to a higher number. If the property is empty, missing, or not set to an integer, a setting of 1 defaults, and a warning message is written to the APP.log and the CWDIRECT.log indicating that a setting of 1 was used.

Troubleshooting: When the logging level is set to debug, detailed messages are written to the app.log during deposit processing. You can use these entries to help troubleshoot any issues with deposit processing. See Logs for background.

Batch Deposit Updates

The DEP_UPDATE job performs updates in the following order.

Table	Update
Invoice Payment Method	The system updates the Invoice Payment Method record with the amount deposited. **Deposit date:** The system updates the deposit created date to the date when the DEP_UPDATE job is processed if the deposit created date was for an earlier date. This may occur if the billing date was earlier than the deposit date.
Card Security Data	If not already cleared, the system removes card security data from the Order Payment Method table and On Line Authorization table. Also, the system creates an order transaction history message indicating the security information has been cleared.
CC Deposit History	The system updates the CC Deposit History record with the response code received from the Deposit service. You can review deposit history in Order Inquiry; see Display Deposit History Screen and Display Deposit History Detail Screen. **Deposit date:** The system updates the deposit date to the date when the DEP_UPDATE job is processed if the deposit date was for an earlier date. This may occur if the billing date was earlier than the deposit date. If the deposit date in this table does not match the date when the DEP_UPDATE job is processed, the system updates the deposit date to the current date.
Order Payment History	The system creates an Order Payment History record. You can review order payment history in Order Inquiry; see Display Order Payment History Screen.
Deposit Reports	The system produces the following reports for each deposit service: • An Unconfirmed Deposits Listing Report for each deposit service lists each deposit included in the transmission but not confirmed or authorized by the service. You can use Manage Rejected Deposits to resubmit. • An Auto Deposit Confirmation Report for each deposit service lists each payment method and total amounts confirmed and unconfirmed.
CC Deposit Transaction	The system deletes the associated records in the CC Deposit Transaction table.

Foreign Currency Deposit Process (Prestige)

If the payment types for the invoice records are set up for foreign currency processing, the system does not communicate with a deposit service at this time. Instead, the system writes the records to the Credit Card Deposit Prestige table (CCCDPP). You can extract the records from this table for transmission to a deposit service at a later time.

The system produces the Unconfirmed Deposits Listing Report for the foreign transactions. However, since it considers each transaction written to the Credit Card Deposit Prestige table as “confirmed,” it does not produce an Unconfirmed Deposits Listing Report for these transactions.

You will need to purge the Credit Card Deposit Prestige table through Purging Prestige Credit Card Deposits (MPSP).

Void Unused Authorization After Initial Deposit

If the deposit amount for a credit card deposit is less than the original amount authorized, the system looks at the setting of the Void auth at deposit field for the service bureau to determine how to process the deposit.

If the Void auth at deposit field for the service bureau is selected, the system automatically voids the remaining balance against a credit card authorization that has been partially deposited. If there are multiple authorizations for the order, the system will not void the other authorizations. The system uses both the authorization transaction ID and, if necessary, the authorization number to determine the authorization history record to be voided.

> **Note:**
>
> If a deposit run contains two deposits against the same authorization transaction and the Void auth at deposit field for the service bureau is selected, the system voids the remaining authorization amount after the first deposit in the run is processed. This allows the second deposit transaction to go out to the service bureau as a conditional deposit.

Example 1: In this example, the Void auth at deposit field for the service bureau is selected.

During order entry, you process an online authorization for an order for $50.00. When you review Authorization History for the order:

- Status = A Authorized
- Amount submitted = $50.00
- Amount available = $50.00

During order maintenance, you cancel an item on the order. The order total reduces to $40.00. You ship and confirm the order. When you review Authorization History for the order:

- Status = A Authorized
- Amount submitted = $50.00

- Amount available = $10.00
- Amount deposited = $40.00

When you submit deposits, the deposit amount is $40.00. Because the Void auth at deposit field for the service bureau is selected and the deposit amount ($40.00) is less than the authorization amount ($50.00), the system voids the remaining authorization amount ($10.00). When you review Authorization History for the order:

- Status = V Voided
- Amount submitted = $50.00
- Amount available =.00
- Amount deposited = $40.00

Example 2: In this example, the Void auth at deposit field for the service bureau is unselected.

During order entry, you process an online authorization for an order for $50.00. When you review Authorization History for the order:

- Status = A Authorized
- Amount submitted = $50.00
- Amount available = $50.00

During order maintenance, you cancel an item on the order. The order total reduces to $40.00. You ship and confirm the order. When you review Authorization History for the order:

- Status = A Authorized
- Amount submitted = $50.00
- Amount available = $10.00
- Amount deposited = $40.00

When you submit deposits, the deposit amount is $40.00. Because the Void auth at deposit field for the service bureau is unselected and the deposit amount ($40.00) is less than the authorization amount ($50.00), the system retains the remaining authorization amount ($10.00). When you review Authorization History for the order:

- Status = A Authorized
- Amount submitted = $50.00
- Amount available = $10.00
- Amount deposited = $40.00

Capture Sequence and Count Sent to CyberSource

The CyberSource Debit Deposit Request (ccCaptureService) XML Message indicates the capture sequence and total capture count if:

- The Void auth at deposit flag for the authorization service is unselected, and
- The entire order does not ship and bill at once, based on the fact that it’s a debit invoice for less than the authorization amount.

Capture count and sequence examples: Examples of how the ccCapture_sequence and ccCapture_totalCount would be populated in the deposit request message:

Scenario	ccCapture_sequence	ccCapture_totalCount
First deposit for the order. The number of deposits is not known, indicated by a total count of 99.	1	99
Second deposit for the order. The number of deposits is not known, indicated by a total count of 99.	2	99
Final deposit for the order. The capture sequence and total count were previously set to 2 and 99. The sequence increments by 1, and the total count is set to match the sequence.	3	3
Final deposit for the order, and the capture sequence and total count were not previously sent. **Note:** In this case, the tags are not passed in the message.	1	1

Larger number of deposits? If the number of deposits for the order is 98 or higher, the sequence number sent in the deposit request remains at 98, and the total count remains at 99 until the final deposit is submitted. At that point, the sequence number is set to 99.

Note that the Authorization History table tracks the actual sequence number and count.

Scenarios in which the ccCapture_sequence and ccCapture_totalCount are not sent in the deposit request message: In the following scenarios, the sequence and total count are still tracked in the Authorization History record, but not included in the deposit request message:

- The tax rate increases, causing the invoice total to exceed the authorization amount. In this scenario, the original Authorization History record is voided, triggering a reversal. A new Authorization History record is created during deposit processing for the full invoice amount.
- There were multiple authorizations, but the products shipped together and generated a single invoice. In this scenario, the original Authorization History records are voided, triggering a Reversal. A new Authorization History record is created during deposit processing for the full amount. The authorization amount and deposit amount will be equal on the new Authorization History record, so it is considered the final deposit.
- The order is closed and the deposit request was already sent, but then an additional charge was added to the order and express-billed. A new Authorization History record is created for the additional charge amount.

- The order is closed but the deposit request was not yet sent, and then an additional charge is added to the order and express-billed. A new Authorization History record is created for the additional charge amount. Both are submitted for deposit and considered final deposits.

The capture sequence and total capture count are not included for the CyberSource Authorization and Deposit Request (ccAuthService and ccCaptureService) XML Message, only for the deposit request.

Multiple Capture Sequence and Final Capture Sent to External Payment Service

The deposit request for credit cards and stored value cards sent through the External Payment Service indicates the capture sequence whether this is the final capture for account situations when:

- The Void auth at deposit flag for the authorization service is unselected, and
- The entire order does not ship and bill at once, based on the fact that it's a debit invoice for less than the authorization amount.

Otherwise, if the Void auth at deposit flag is selected, the deposit request indicates a multiple capture sequence of 0, and the finalCapture tag is empty.

Capture count and sequence examples: Examples of how the multipleCaptureSequence and finalCapture would be populated in the deposit request message:

Scenario	multipleCaptureSequence	finalCapture
Void auth at deposit **is selected**	0	empty
Void auth at deposit is not selected and: • First deposit • Entire order ships and bills	1	Y
Void auth at deposit is not selected and: • First deposit • Additional item remains to be shipped	1	N
Void auth at deposit is not selected and: • Second deposit • No additional items remain to be shipped	2	Y

> **Important:**
>
> Your end payment processor, such as Paymentech or VisaNet, must support split shipments for you to set the Void auth at deposit flag to N.

Error if deposit is greater than authorization (additional scenario for a stored value card): The External Payment Service returns the error DEPOSIT_GREATER_THAN_AUTH in a situation such as the following for a stored value card:

- The Void auth at deposit flag is unselected.
- An additional item with a higher price is added to the order after the initial authorization, and an additional authorization is obtained for this second item during pick slip

generation; however, the additional authorization is based on the authorization required for the second item minus the current authorization amount, but not the full authorization amount that will be required for both items. For example:

  - ITEM01 is 25.00 and shipping is 10.00: 35.00 authorized.
  - ITEM02 is 50.00 and the 10.00 shipping billed when ITEM02 ships first: 60.00 authorization required.
  - When pick slip generation runs for ITEM02, additional 25.00 authorized (60.00 required - 35.00 already authorized).

- The second item ships before the first item on the order, and the deposit amount exceeds the amount of the first authorization because of the second item's higher price. Order Administration submits the largest existing authorization amount, which is 35.00. As a result, during deposit processing through the External Payment Service, Order Administration receives the DEPOSIT_GREATER_THAN_AUTH error based on the specified deposit amount of 60.00.
- n this case, when Order Administration receives the error response, it submits two deposit requests:
  - One for the 35.00 authorization amount.
  - One for the 25.00 authorization amount.

    Each request specifies the related authorization number, and a `multipleCaptureSequence of 1 and a finalCapture of Y`, because each request is for a separate authorization amount.
- When the original 25.00 item is in stock, Order Administration obtains a new authorization for 25.00. Then when that item ships, Order Administration submits another deposit request for 25.00, which also specifies a `multipleCaptureSequence of 1 and a finalCapture of Y` for the additional authorization.

Deferred or Installment Pay Plans vs. Regular (Non-Pay Plan) Orders

Overview: You can use flexible payment options to set up deferred or installment pay plans for your customers. Unlike regular deposits, deferred or installment deposits are not eligible for processing immediately after confirmation of shipment and creation of the invoice; instead, the system assigns a pay plan deposit with a deposit release date based on the deferral or installment agreement.

Example: Deferral pay plan: "no payment for 60 days" or "no payment till February 1" Installment pay plan: "4 easy payments"

You can use deferred or installment pay plans only if the Deferred and Installment Billing (F51) system control value is selected. See Deferred/Installment Billing Overview for an overview of deferred and installment billing and information on setting up pay plans in your company.

Deposit Release Date

The deposit release date indicates when the deposit is eligible for processing.

Type of Order	Deposit Release Date
regular (non-pay plan)	same as invoice date: deposit is eligible for processing immediately after billing

Type of Order	Deposit Release Date
deferral pay plan	can be either a fixed date ("no payment till February 1") or based on a specific interval ("no payment for 60 days") if based on a specific interval, can be calculated based on either order date or invoice date
installment pay plan	first deposit release date can be either the next time a fixed date occurs ("installments due the first of the month") or after a fixed interval from time of shipment

To review the deposit release date: The deposit release date is stored in the Invoice Pay Method table. You can review this information in order inquiry by selecting Invoices to advance to the Display Invoices screen, then selecting Invoice Pay Sum to advance to the Invoice Pay Summary Screen.

Authorizing Deposits

Unlike regular deposits, a deferred or installment deposit may not already have a current, valid authorization from the time of pick slip generation, so you need to obtain an authorization when you process deposits.

Overview: When you generate pick slips for a regular (non-pay plan) order, you authorize the pickable amount of the order, because you expect to confirm shipment and process the deposit shortly after. However, after you obtain an initial authorization for an order using a pay plan, there may be a considerable delay before you process the deposit or deposits. For this reason, it may be necessary to authorize the deposit amount as part of deposit processing.

Authorization at pick slip generation:

When you print a pick slip for...	The amount authorized is...
a regular (non-pay plan) order	the full pickable amount of the order (including any tax, shipping, and charges)
a deferred billing pay plan order	one dollar, unless the Authorize full amount field for the pay plan is selected
an installment billing pay plan order	the first payment of the installment plan, unless the Authorize full amount field for the pay plan is selected

Note:

Even if the Authorize full amount field for the pay plan is selected, the system still re-authorizes the installment amount when you process the subsequent deposit(s) for the pay plan order.

Action codes: The system uses action codes to indicate to the deposit service whether the deposit requires an authorization. When processing deposits, the system sends the deposit service an action code of:

- B (Conditional Deposit) if you need both an authorization and a deposit. The system sends a code of B for:
  - all pay plan deposits (regardless of how the Authorize full amount field for the pay plan is set) except for the first deposit of an installment plan, when a D code is sent instead.
  - any regular (non-pay plan) deposit sent to the deposit service whose authorization has expired. You can review the authorization expiration date at the Authorization History Details Window. Additionally, the system creates a new authorization history record for the new authorization number. The system assigns a Status of M (Mismatch Auth/Deposit) to authorization history records created during deposit processing.

    > **Note:**
    >
    > Conditional deposit is not supported for stored value cards.

- D (Regular Deposit) if you need to process the deposit only and do not require an authorization. The system sends a code of D for all regular (non-pay plan) deposits as long as there is an authorization code for the invoice pay method and the authorization has not expired.

Type of deposit	Action code
regular (non-pay plan)	D **Note:** The system sends an action code of B for any regular deposit sent to the deposit service whose authorization has expired.
first payment of an installment pay plan	D
subsequent payments of an installment pay plan	B
deferred billing pay plan	B
credit (refund)	R

It is possible to have a pay plan order where the deposit release date is the same as the invoice date. For example, if you set up a deferred pay plan based on order date, and shipment of the order is delayed due to a backorder, the order could be eligible for deposit as soon as you confirm shipment. In this situation, the deposit will still be sent with an action code of B, because typically you have not yet received an authorization for the amount of the deposit.

Force Deposit

You can choose to “force the deposit” when an authorization for a deferred or installment pay plan is rejected. Forcing the deposit means that the system performs all the same updates in your company as if the deposit was authorized and processed.

To force pay plan deposits, you must select the Force deposit for FPO field for the vendor response code. The system checks the setting of this field only when a deposit for a pay plan is rejected. See below for more information.

You are responsible for making any necessary arrangements with the deposit service if you plan to force deposits.

When is a pay plan deposit forced? The system forces a deposit when:

- the deposit is for a deferred or installment pay plan, and
- the deposit is sent out with an action code of B, and
- the response code sent from the service is not an approval (100 = approval), and
- the Force deposit for FPO field for the vendor response code is selected.

When is a regular (non-pay plan) deposit forced? Additionally, regular (non-pay plan) deposits are always forced because you received an authorization when you generated the pick slip, except under the following circumstances:

- The action code on the deposit is D or R and
- You are using an authorization service that allows forced deposits and
- The Vendor Response code is not an approval (100 = approval) and
- The regular deposit is returned from the authorization service with an authorization number of NOTDEP.

Netting Credits for Pay Plan Orders

The Net Credit Card Credits for Deferred and Installment Billing (F55) control value controls how refund credits are deposited for deferred or installment pay plans.

Overview: The system does not process a credit card credit against an installment or deferred billing order before the deposit itself has been processed. This rule is important to ensure that you do not credit the customer's credit card before it had actually been charged. The logic governing how to comply with this rule varies depending on whether the order uses a deferred or installment pay plan and on whether you net credit card credits.

The table describes how and when credits are eligible for deposit processing in different scenarios. In each scenario, it is assumed that the following has already occurred:

- the order has a deferred or installment pay plan
- shipment has taken place
- the refund has been processed through the Process Refunds menu option (fast path = MREF)

Type of Pay Plan	Net Credits?	Result
deferred	Unselected	The credit has a deposit release date that is the same date as the debit. The credit deposit is eligible for processing after the purchase deposit is processed. Example: • Ship an order on 8/1 for $100 with a deposit release date of 9/1 • Process return on 8/15 for $60: credit is for $60 and has a deposit release date of 9/1 • Process Deposits processes the credit of $60 after the debit of $100 is deposited.

Type of Pay Plan	Net Credits?	Result
deferred	Selected	The credit has a deposit release date that is the same date as the debit. When you process deposits, the net amount of the deposit only is processed. Example: • Ship an order on 8/1 for $100 with a deposit release date of 9/1 • Process return on 8/15 for $60: credit is for $60 and has a deposit release date of 9/1 • Process Deposits processes a deposit of $40 ($100 - $60)
installment	Unselected	The credit has a deposit release date that is the same as the date you created it; however, the credit deposit is eligible for processing after the total debit deposits meet or exceed the credit invoice amount. Example: • Ship an order on 8/1 for $100 with 4 installments of $25, deposit release dates of 9/1, 10/1, 11/1, and 12/1 • Process first installment deposit on 9/1 for $25 • Process return on 9/15 for $60: credit is for $60 and has a deposit release date of 9/15, but is not released for deposit • Process second installment deposit on 10/1 (total amount deposited now $50) • Process third installment deposit on 11/1 (total amount deposited now $75) • Process Deposits processes the credit of $60
installment	Selected	The credit has a deposit release date that is the same as the date you created it. When you process deposits, the remaining installment amounts are reduced by the total credit amount. Example: • Ship an order on 8/1 for $100 with 4 installments of $25, deposit release dates of 9/1, 10/1, 11/1, and 12/1 • Process first installment deposit on 9/1 for $25 • Process return on 9/15 for $60: credit is for $60 and has a deposit release date of 9/15 • When you next process deposits, the amount of each remaining installment is reduced to $5 ($75 remaining installments - $60 credit = $15; $15 / 3 installments = $5)

Merchant ID Messages

You can specify a message to appear on the customer's credit card statement when you process a deposit for a pay plan. The message is concatenated with additional information into a 14- or 18-position message, formatted as follows:

- DBA industry code (3 positions): taken from the first 3 positions of the Industry format code for the authorization service
- Merchant ID message (11 positions): taken from the Merchant ID message field for the pay plan

- Installment description (4 positions): for installment pay plans, this consists of a description of which installment was deposited, for example, 1of 4. With this description, the entire message for an installment plan is 18 positions. For deferred pay plans, the entire message ends after the merchant ID message, producing a 14-position message.

See Defining Authorization Services (WASV).

Updates for Installment Pay Plans

When you process a deposit for an installment pay plan, the system updates the following fields for the invoice pay method:

- Intervals remaining: reduced by one.
- Total amount deposited: increased by the deposit amount.
- Deposit release date:
  - if the installment plan uses an interval, the deposit release date is calculated by adding the interval number of days to the current date.
  - If the installment plan uses a fixed billing date, the deposit release date is changed to the next occurrence of the billing date.
- Deposit created date: This field is updated with the current date only when you deposit the last installment payment.

You can review the invoice pay method information in order inquiry. See Reviewing Deposits in Order Inquiry.

Rejected Deposits for Pay Plan Orders

Unauthorized or unconfirmed deposits display on the Unconfirmed Deposits Listing Report. Additionally, you can use Resubmit Rejected Deposits in Modern View to review, work with, or resubmit any deposits that were not fully processed through the Submit Auto Deposit menu option.

Holding orders: When a deposit is rejected for a deferred or installment pay plan, orders for the same customer and/or using the same credit card number are put on hold. See Holding Pay Plan Orders.

Installments: Additionally, when a deposit is rejected for an installment pay plan, the next installment date is changed to 999999.

Non-pay plan orders: Unconfirmed regular (non-pay plan) orders still appear on the Unconfirmed Deposit Listing and are available through the Resubmit Rejected Deposits screen in Modern View.

Holding Pay Plan Orders

When a deposit for a deferred or installment pay plan is rejected, the system puts any open orders for the same customer or the same credit card number on hold, as follows:

- same sold to customer: order goes on SB hold
- same credit card number: order goes on CB hold

If an order matches both the customer and the credit card number, it goes on CB hold.

> **Note:**
>
> You must set up these hold reason codes in your company. See Establishing Order Hold Reason Codes (WOHR).

Order history message: The system also writes a message to order history when it puts the related order an hold, for example:

```
8/10/06   H   CB Hold.  Rejected deposit on 4778/3282
       114.84   SAMPLENAME
```

In the above example, the 4778/3282 refers to the order number and invoice number of the deposit that was rejected, and the 114.84 refers to the rejected deposit amount.

See Reviewing Financial Information on an Order for more information on reviewing information in order inquiry.

For more information:

- See Rejected Deposits for Pay Plan Orders for more information on how the system handles deposits that are not forced.
- See Deferred/Installment Billing Overview for more information on the necessary setup to use deferred or installment pay plans.
- See Defining Vendor Response Codes for more information on setting up a response code to force deposit.

Stored Value Card Deposits

When processing a deposit for a stored value card, the system uses the action code D to process the deposit. Conditional deposit (B) is not supported for stored value cards.

Multiple authorizations: If there are multiple authorizations for the order and the deposit amount is greater than the remaining amount for each authorization on the order, the system will send the first authorization number for the deposit record. However, once the deposit response is received, the system will deposit both authorizations. For example, if you have 2 authorizations for 20.00 and the deposit amount is 40.00, the system will send the first authorization number for the deposit record, but will deposit both authorizations once a response is received.

If the stored value card cannot cover the entire deposit amount: If the balance on the stored value card cannot cover the entire deposit amount, the system will reject the entire deposit amount.

Stored value card credits: When you deposit a refund credit against a stored value card, the service bureau sends back a new authorization number with the deposit response; because of this, the system creates a new authorization for the credit amount that is already updated to a deposit status. At this point, the credit amount is reimbursed to the stored value card.

If the deposit amount is less than the original authorization amount: If the deposit amount is less than the original amount authorized:

- External Payment Service: The Void auth at deposit flag, set up through Defining Authorization Services (WASV), indicates how to process the deposit. See Multiple

Capture Sequence and Final Capture Sent to External Payment Service for a discussion.

- Other authorization services: The Retain Unused Stored Value Card Authorization After Deposit (J21) system control value indicates how to process the deposit.
  - If the Retain Unused Stored Value Card Authorization After Deposit (J21) system control value is selected, the system will retain a stored value card authorization after it has been partially deposited. For example, if the authorization amount is 50.00 and the deposit amount is 40.00, the system will retain the remaining 10.00 on the authorization.
  - If the Retain Unused Stored Value Card Authorization After Deposit (J21) system control value is unselected, the system will void the remaining balance against the authorization. For example, if the authorization amount is 50.00 and the deposit amount is 40.00, the system will void the remaining 10.00 on the authorization. If there are multiple authorizations for the order, the system will not void the other authorizations.

Stored value card authorization reversals during deposits: If the Perform Authorization Reversal during Deposit Processing (J20) system control value is selected, when you process deposits and the deposit amount is less than the original authorization amount, the system reimburses the stored value card the difference. For example, if the original authorization amount is 50.00, but the deposit amount is 30.00, the system will deposit 30.00 and reimburse 20.00 to the stored value card. See Authorization Reversal Process During Deposits for more information.

Sending deposits for the same order and authorization number as Conditional: For the deposit service defined in the Deposit Service for Conditional Deposits (L13) system control value, the system sends subsequent debit deposits (transaction type Purchase action code D) for the same order number and authorization code as a Conditional Deposit (transaction type Conditional, action code B) rather than a Regular Deposit (transaction type Purchase action code D). See this system control value for examples. **Note:** to use this system control value, the Retain Unused Stored Value Card Authorization After Deposit (J21) system control value must be selected and the Perform Authorization Reversal during Deposit Processing (J20) system control value must be unselected.

Reviewing Deposits in Order Inquiry

You can use order inquiry to review the deposit status of credit card payment methods for both pay plan and regular (non-pay plan) orders.

Screen	Use for:	To advance to in order inquiry:
Invoice Pay Summary	• review the total amount deposited for each invoice • review deposit release date	select Invoices, then Invoice Pay Sum
Display Invoice Pay Method	• review credit card, authorization, or installment schedule information	select Display for an invoice at the Invoice Pay Summary screen

Screen	Use for:	To advance to in order inquiry:
Change Invoice Pay Method	• review or change the deposit release date, installment information, or credit card • apply a direct cash or check payment • indicate the disposition of a rejected deposit amount	select Change for an invoice at the Invoice Pay Summary screen **Note:** This screen is also available through Manage Rejected Deposits in Modern View.
Display Deposit History	• review deposit attempts and responses	select Deposit History for an invoice at the Invoice Pay Summary screen **Note:** This screen is also available through Manage Rejected Deposits in Modern View.
Display Order Payment History	• review messages written by the system describing invoice activity, including changes to the deposit release date and credit netting calculations	select Payment History for an invoice at the Invoice Pay Summary screen **Note:** This screen is also available from the Display Order Payment Methods screen in order inquiry (select Payments)

See Reviewing Financial Information on an Order for more information on reviewing invoice and deposit activity in order inquiry.

Printing the Deposit History Summary (PDHS)

Purpose: Use the Deposit History Summary report to review the total deposits processed by date. This report breaks out the totals by pay type, and includes debit and credit subtotals for regular deposits, deferred billing, and installments.

The Deposit History Summary report includes only deposits that were actually processed, not rejected or unconfirmed deposits.

Deposit History Summary Screen

Purpose: Use this screen to select the dates to include on the Deposit History Summary Report and to print the report.

How to display this screen: Enter PDHS in the Fast path field at the top of any menu or select Print Deposit History Summary from a menu.

Field	Description
Start date	The first date to include on the report. The current date defaults. Numeric, 6 positions (in user date format); required.
End date	The last date to include on the report. The current date defaults. Numeric, 6 positions (in user date format); required.

Screen Option	Procedure
Generate the Deposit History Summary Report	Select Submit.

Printing the Credit Card Deposit Schedule (PCCD)

Purpose: Use the Credit Card Deposit Schedule to review the credit card deposits you can expect to process through deferred or installment payment plans for a given period. This report:

- lists each order or order shipment with pending deposits
- provides totals by type of payment plan, pay type, and date
- breaks out credits and debits

Summary report: This menu option also produces the Credit Card Deposit Schedule Summary. This report summarizes the projected deposits by omitting the order-level information.

Credit Card Deposit Schedule Screen

How to display this screen: Enter PCCD in the Fast path field at the top of any menu or select Print Credit Card Deposit Schedule from a menu.

Field	Description
Start date	The first expected deposit date to include on the report. The current date defaults. Numeric, 6 positions (in user date format); required.
End date	The last expected deposit date to include on the report. The current date defaults. Numeric, 6 positions (in user date format); required.
Print detail	Indicates whether to print the Credit Card Deposit Schedule. Valid values are: Selected (default) = print the Credit Card Deposit Schedule Unselected = do not print the Credit Card Deposit Schedule
Print summary	Indicates whether to print the Credit Card Deposit Schedule Summary. Valid values are: Selected (default) = print the Credit Card Deposit Schedule Summary Unselected = do not print the Credit Card Deposit Schedule Summary

Screen Option	Procedure
Generate the Credit Card Deposit Schedule and the Credit Card Deposit Schedule Summary reports	Select Submit.

Printing the Pending Payment Plan Deposits (PPPD)

Purpose: Use the Pending Payment Plan Deposits Report to review the payment plan orders with pending deposits for a range of invoice dates. This report includes detail information, such as the pay plan on the order. This report does not include regular (non-pay plan) deposits, which are eligible for processing immediately after billing.

See Deferred/Installment Billing Overview for more information on installment or deferred pay plans.

Pending Payment Plan Deposit Report Screen

How to display this screen: Enter PPPD in the Fast path field at the top of any menu, or select Print Pending Pay Plan Report from a menu.

Field	Description
Start date	The first invoice date to include on the report. This is the date when you confirmed shipment of the order. The current date defaults. Numeric, 6 positions (in user date format); required.
End date	The last invoice date to include on the report. The current date defaults. Numeric, 6 positions (in user date format); required.

Screen Option	Procedure
Generate the Pending Payment Plan Deposits Report	Select Submit.

Printing the Deposit History Detail Report (PDHD)

Purpose: Use the Deposit History Detail report to review deposits processed during a specific date range. Within this date range, you can select to include only deposits for a specific authorization service, pay type, and status.

Print Deposit History Detail Screen

Purpose: Use this screen to select the dates to include on the Deposit History Detail Report and to print the report. You can also specify to include only those deposit transactions for a specific:

- Auth Service
- Pay Type
- Status

How to display this screen: Enter PDHD in the Fast path field at the top of any menu or select Print Deposit History Detail Report from a menu.

Field	Description
Start Date	The first date for the deposits to include on the report. The system uses the Deposit date in the Deposit History table to determine which deposit transactions to include on the report. Numeric, 6 positions (in user date format); required.
End Date	The last date for the deposits to include on the report. The system uses the Deposit date in the Deposit History table to determine which deposit transactions to include on the report. Numeric, 6 positions (in user date format); required.
Auth Service	The authorization service that was used for the deposits to include on the report. The system uses the Authorization code in the Deposit History table to determine the deposit transactions to include on the report. Authorization service codes are defined in and validated against the Authorization Service table; see Defining Authorization Services (WASV). Alphanumeric, 3 positions; optional.
Pay Type	The pay type that was deposited against. The system uses the Pay type in the Deposit History table to determine which deposit transactions to include on the report. Pay type codes are defined in and validated against the Pay Type table; see Working with Pay Types (WPAY). Numeric, 2 positions; optional.
Status	The status of the deposits to include on the report. The system uses the Status in the Deposit History table to determine which deposit transactions to include on the report. Valid statuses are: • Confirmed • Deleted • Forced • Manual Confirm • Prepaid • Resubmitted • Sent • Unconfirmed Written Off Optional.

Screen Option	Procedure
Generate the Deposit History Detail Report	Enter information in the fields on the Print Deposit History Detail Screen and select Print Report. The system submits the CC_DEP_DTL job and returns you to the menu screen.

E-Commerce Interface

Topics in this part:

- E-Commerce Catalog Requests describes how the system processes a catalog request received from the web storefront.
- E-Commerce Item Availability Processing describes how the system extracts item availability information for download to the web storefront.

  For more information see the Web Services Guide on https://support.oracle.com My Oracle Support (ID 2953017.1).
- Working with Batch Order Maintenance Transactions (WBOM) describes how the system processes a cancellation request from the web storefront and how to work with order cancel request errors.
- E-Commerce Setup describes the setup required in Order Administration for the e-commerce interface, and specifies additional documentation detailing setup requirements for communicating and for the web storefront.
- Downloading E-Commerce Offer Files (EOFR) describes the process you use to extract information related to items, source codes and offers to staging files for subsequent download to the web storefront.
- Working with E-Mail Notification Templates (WEMT) describes how to set up templates for the various email notifications you can send to customers.
- Sending Internet Order Ship Confirmation (ESCF) describes the menu option you use to send email confirmations for shipment of orders received through the web storefront.

Working with Batch Order Maintenance Transactions (WBOM)

Purpose: Use this menu option to work with errors resulting from order cancel requests from the web storefront.

About order cancel requests from the web: You can enable your customers to submit cancel requests from the web storefront if you use the e-commerce interface. Each cancel request on the web storefront generates a message to Order Administration indicating whether to cancel the order or a specific order line. Occasionally, the system cannot process the request. For example, the customer might attempt to cancel an order line that has recently shipped.

Typically, you would first check the status of the order using the *Generic Customer History API* to determine the details of the order you wish to cancel.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Cancel request: The request specifies the order ship-to or order lines you wish to cancel.

Cancel response: The response message merely indicates that the request was received; a subsequent email confirmation indicates whether the cancellation request was successful.

Fixing errors: When there is an error, you might choose to complete the requested transaction yourself; or you might need to contact the customer for further information if the desired transaction is not clear. However, you cannot edit and resubmit the maintenance requests through the Batch Order Maintenance menu option. Once you have resolved the request through research, order maintenance, or customer contact, you should delete the related error record.

What if the order includes a membership item? If the cancel request attempts to cancel a membership item, the order cancellation process does not automatically cancel the customer membership created by the membership item. You need to use Working with Customer Memberships (WWCM) in order to cancel the customer membership.See Membership Overview for background on customer memberships.

What if the order includes an order line assigned to Order Orchestration? If the cancel request attempts to cancel a brokered backorder, the request goes into error status with an error of Order Has Picks Open. You need to use order maintenance or cancel option in Work with Order Broker to cancel the order line. See Brokered Backorders for an overview.

What if the order is a retail pickup or delivery order received from Order Orchestration? If the cancel request is for a retail pickup or delivery order, the process sends a status update to Order Orchestration indicating that the order is canceled. Order Orchestration does not attempt to find another location to fulfill the order. See Retail Pickup (including Ship-for-Pickup) or Delivery Orders for an overview.

What if the order is a store pickup order? You cannot cancel a store pickup order through the CWCancel message. See Store Pickup Orders for background or store pickup orders.

In this topic:

- E-Commerce Cancel Setup
- E-Commerce Cancel Process
  - When is an Order Eligible for Cancellation through the E-Commerce Interface?
  - Order Inquiry/Maintenance Message Flow
  - Processing the Request
  - E-Commerce Cancellation Transactions
  - Emails for E-Commerce Cancels
  - Order History Messages
- Work with Batch OM Transactions Screen
- Display Batch OM Transactions Screen (Header)
- Display Batch OM Transactions Screen (Detail)
- Display Batch OM Detail Screen
- Display Batch OM Errors Screen
- Batch Order Cancel Errors
- E-Commerce Order Maintenance Errors Report
- E-Commerce Cancel Request Message (CWCancel): See the Order Admiistration Web Services Guide on My Oracle Support (ID 2953017.1

E-Commerce Cancel Setup

The CWServiceIn web service allows an external system to post the E-Commerce Cancel Request Message (CWCancel) directly to Order Administration and receive responses without the need of any queues.

See the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1

Web service authentication? Use the Working with Web Service Authentication (WWSA) menu option to define a valid user for basic web service authentication, or client ID if using OAuth. You must also create a corresponding user profile in Oracle Identity Cloud Service and assign the user to the corresponding web service role defined for the Order Management application.

You can use the CWServiceIn web service as a RESTful web service.

Setup for the CWServiceIn RESTful Web Service

You POST the E-Commerce Cancel Request Message (CWCancel) to the web service's URL, or endpoint, of the RESTful service. The web service routes the messages sent to the endpoint and dispatches them to the E-Commerce Cancel process. When the E-Commerce Cancel process generates a response, the CWServiceIn web service routes the response. See the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1

Message type: The type attribute in the inbound message identifies the Order Administration process, so the CWServiceIn web service can route the message appropriately. The correct type for the E-Commerce Cancel Request Message (CWCancel) is CWCancel.

Determine the endpoint: The individual URL for the CWServiceIn RESTful service uses the following format: `http://server:port/oms/sxrs/application/CWServiceIn`, where `server:port` identifies the application server where the RESTful service is located and CWServiceIn is the name of the web service to call.

E-Commerce Cancel Process: When is an Order Eligible for Cancellation through the E-Commerce Interface?

In order to be fully or partially canceled through the e-commerce interface, the order must:

- have originated on the web storefront. If an order originated on the web, the Internet order field on the Order Header table is set to I.
- be in an open (O) or held (H) status
- have no pick slips printed
- not be assigned to Order Orchestration for fulfillment

Also, you will not be able to complete cancellation of the order or order line if the order is in use. The system determines that an order is “in use” if the User field on the Order Header table is not blank; for example, the system populates this field when you are maintaining an order, and clears it when you are done with maintenance.

What if the order includes a membership item? If the cancel request includes a membership item, the order cancellation process does not automatically cancel the customer membership created by the membership item. You need to use Working with Customer Memberships (WWCM) in order to cancel the customer membership.See Membership Overview for background on customer memberships.

What if the order includes an order line assigned to Order Orchestration? If the cancel request attempts to cancel an order line that is assigned to Order Orchestration for fulfillment, the request goes into error status with an error of Order Has Picks Open. You need to use order maintenance or the Working with Order Broker

(WOBR) option to cancel the order line. See Order Orchestration Integration for an overview.

Order Inquiry/Maintenance Message Flow

Order inquiry and maintenance through the e-commerce interface use the following messages:

Message	Direction	Purpose
To check status:		
Customer History Request XML Message (CWCustHistIn) For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	web storefront to Order Administration	Inquires on the status of the order.
Detailed Order Inquiry Response XML Message (CWORDEROUT) For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	Order Administration to web storefront	Provides information on the order header and detail.
To cancel:		
E-Commerce Cancel Request Message (CWCancel) See the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	web storefront to Order Administration	Attempts to cancel: • individual items, or reduce the quantities of selected items; or, • the entire order ship-to (a separate cancel request is required to cancel each separate shipping address for the order) This message also indicates the reason for the cancellation. See E-Commerce Cancellation Transactions.

Processing the Request

In response to a cancellation request from the web storefront, the system:

- Locks the order: The system sets the User field on the Order Header table to E-COMMERCE to prevent another user or process from attempting to update the order at the same time.
- Creates batch order maintenance error records: The system uses these records, if necessary, to track any errors in the cancellation request. See Work with Batch OM Transactions Screen.
- Edit: Next, the system checks whether there are any errors for the request.
- If there are no errors, the system:
  - processes the requested update(s) to the order.
  - deletes the batch order maintenance error records.
  - unlocks the order.

- If there are errors, the system:
  - updates the batch order maintenance error record with one or more error codes. See Display Batch OM Errors Screen.
  - depending on customer preference, sends the customer an email indicating that the cancellation attempt was not successful. See Emails for E-Commerce Cancels.
  - writes an order history message indicating that the attempt to update the order was not successful and that an email was generated. See Order History Messages.
  - places the order on hold if there is a hold reason specified in the Hold Reason for Failed E-Commerce Maintenance Transactions (H11) system control value.
  - produces the E-Commerce Order Maintenance Errors Report.
  - unlocks the order.

You can use the Work with Batch OM Transactions Screen to review any cancel requests that are in error.

> **Note:**
>
> If there are any errors in the request, none of the requested changes will be processed until the errors are corrected and the edit resubmitted.

E-Commerce Cancellation Transactions

Required for each cancel request:

- Company_code: three positions, alphanumeric; for example, company 7 is indicated by 007
- Order_id: order number
- Ship_to: the number identifying the shipping address on the order; for example, an order with a single shipping address has a ship-to number of 001
- Cancel_type:
  - O (default) = order
  - L = line

Whole order, single ship-to: The Cancel_type must be O and the Order_reason must specify a valid cancel reason code for the order.

> **Note:**
>
> If there are multiple shipping addresses, the cancel request for each ship-to must be sent separately.

Single item, reducing quantity or canceling the entire order line: the Cancel_type must be L and the following information is also required:

- Line_number: the order line number to be cancelled or have its quantity reduced
- Qty: the total quantity to cancel
- Reason: the valid cancel reason code

Emails for E-Commerce Cancels

Cancellation email: The ORDR_ASYNC job generates an order or order line cancellation email to the customer if:

- the cancellation attempt is successful, and
- you have specified an:
  - Order Line Cancellation Email Program (K79), if no shipments have occurred, or
  - Order Cancellation Email Program (K78), and
- the cancel reason code you use does not match the Cancel Reason Code to Suppress Email (L08), and
- the customer is eligible to receive email notifications; see When Does the System Generate an Email Notification?

See the Order Cancellation Confirmation Email Sample and Contents and the Order Line Cancellation Confirmation Email Sample and Contents for more information.

If the cancellation attempt is unsuccessful, the system generates the maintenance failure email if:

- you have specified a Order Maintenance Confirmation E-Mail Program (H12), and
- the customer is eligible to receive email notifications; see When Does the System Generate an Email Notification?

See the Order Cancellation Confirmation Email Sample and Contents for more information.

The system selects the order cancellation, order line cancellation, or maintenance failure email template as appropriate. See Work with E-Mail Template Screen. If the system sends an email, this information is noted in the order history message.

Order History Messages

The system writes the following message to order history if the cancellation request fails: `Web cancel request failed.`

If the cancel request is successful:

```
Web maintenance request processed.
```

If the system generates an email notification (see Emails for E-Commerce Cancels), it writes a message such as one of the the following:

```
Ord Can Conf to user@example.com.
```

or

```
Ord Can Fail to user@example.com
```

You can review order history messages at the Display Order History Screen. The system assigns the default user ID, DEFAULTUSR, to the order history messages.

Work with Batch OM Transactions Screen

Purpose: Use this screen to review any errors that have resulted when customers attempt to cancel orders from the web storefront. Also, you can use this screen to delete error records once you have resolved the errors, as the system does not delete them automatically.

Fixing errors: You might choose to complete the requested transaction yourself; or you might need to contact the customer for further information if the desired transaction is not clear. However, you cannot edit and resubmit the cancellation requests through this menu option.

For more information: See E-Commerce Cancel Process.

How to display this screen: Enter WBOM in the Fast path field at the top of any menu, or select Work with Batch OM Transactions from a menu.

Field	Description
Order number	An order that a customer has attempted to cancel from the web storefront. Numeric, 8 positions; optional.
St# (Ship-to number)	This number indicates the order ship-to address that the customer attempted to cancel. Numeric, 3 positions; optional.
Activity	The type of transaction that the customer attempted to perform. Valid values are: • Cancel Order • Line Cancel This field is blank if the cancel request message from the web storefront did not specify a valid cancel type code. Display-only.

Screen Option	Procedure
Delete a batch order maintenance error record	Select Delete for an error record to delete it. The system does not delete errors automatically, so typically you will delete errors as you resolve them.
Display a cancel request in error	Select Display for an error record to display the header-level information for the cancel request. You advance to the Display Batch OM Transactions Screen (Header). If the request includes serious errors, you will not be able to review the error record; instead, the system displays a message such as the following: Order 5493-7 is invalid -- cannot display. Print list to see errors. See E-Commerce Order Maintenance Errors Report.
Display the error message(s) for a cancel request	Select Errors for an error record to review the error message(s) for the cancel request. You advance to the Display Batch OM Errors Screen.

Screen Option	Procedure
Advance to standard order inquiry	Select Order Inquiry for an error record to advance to Order Inquiry Header Screen or the Order Inquiry Detail Screen for the related order, depending on the setting of the Default Version for Order Inquiry (C34) system control value.
Print a listing of all batch order maintenance errors in your company	Select Error List to print the E-Commerce Order Maintenance Errors Report, including all errors in your company.

Display Batch OM Transactions Screen (Header)

Purpose: Use this screen to review the header-level information that was included in the cancel request from the web storefront that was in error, so that you can determine the transaction that the customer was attempting to process.

Note: If the request includes serious errors, you will not be able to review the error record; instead, the system displays a message such as the following: Order 5493-7 is invalid -- cannot display. Print list to see errors.

You can use the Display Batch OM Errors Screen to review the errors.

How to display this screen: Select Display for a cancellation error at the Work with Batch OM Transactions Screen.

Field	Description
Order number	An order that a customer has attempted to cancel from the web storefront. The order ship-to address is separated from the order number by a hyphen. Order number: numeric, 8 positions; display-only. Ship-to number: numeric, 3 positions; display-only.
Activity	The type of transaction that the customer attempted to perform. Valid values are: • Cancel Order • Line Cancel This field is blank if the cancel request message from the web storefront did not specify a valid cancel type. Display-only.
Cancel reason	The cancel reason code to use when cancelling the order. This information is included only for an order-level cancel request. Numeric, 2 positions; display-only.

Screen Option	Procedure
Select a detail line transaction from the cancel request for review	Select Details to advance to the Display Batch OM Transactions Screen (Detail) if the cancel request was a line cancel.
Display the error message(s) for this cancel request	Select Errors to advance to the Display Batch OM Errors Screen.

Screen Option	Procedure
Advance to standard order inquiry	Select Order Inquiry for an error record to advance to Order Inquiry Header Screen or the Order Inquiry Detail Screen for the related order, depending on the setting of the Default Version for Order Inquiry (C34) system control value.
Print a listing of the errors for this cancel request	Select Error List to print the E-Commerce Order Maintenance Errors Report, including all errors for this cancel request only.

Display Batch OM Transactions Screen (Detail)

Purpose: Use this screen to select a detail line for review if a cancel request in error included order line-level information. Line-level information could include either canceling a particular line or reducing the quantity.

If the request was to cancel the order, there will not be any detail information on this screen.

How to display this screen: Select Details at the Display Batch OM Transactions Screen (Header).

Field	Description
Order number	An order that a customer has attempted to cancel from the web storefront. The order ship-to address is separated from the order number by a hyphen. Order number: numeric, 8 positions; display-only. Ship-to number: numeric, 3 positions; display-only.
Action	The action that the customer has attempted to perform against the order detail line. The only valid value is: Line cancellation = Reduce the quantity of the order detail line or cancel it entirely Display-only.
Line number	The order detail line number to be cancelled. Numeric, 3 positions; display-only.
Cnr (Cancel reason code)	The cancel reason code specified in the cancel request to describe why the customer wants to cancel or reduce the quantity of the order detail line. This information is included only for a detail-level cancel request. Numeric, 2 positions; display-only.
Qty	The quantity of the item that the customer has attempted to cancel. Numeric, 3 positions; display-only.

Field	Description
Item	The item that the customer has attempted to cancel. The system determines which item the customer has selected by the order detail line (when working with an existing order detail line) or the short SKU number (when adding a new item to the order). The short SKU number is stored in the SKU table. If the request does not specify a valid short SKU, the item and SKU information listed on this screen may be inconsistent; for example, even if the item code is valid, the SKU information may not represent a valid SKU for the item. Alphanumeric, 12 positions; display-only.
SKU	The item's unique characteristics, such as its color and size. Alphanumeric, three 4-position fields; display-only.

Screen Option	Procedure
Select a detail transaction in error to review	Select Display Display Batch OM Detail Screen.
Review header information for the maintenance or cancel request	Select Header to advance to the Display Batch OM Transactions Screen (Header).
Display the error message(s) for the maintenance or cancel request	Select Errors to advance to the Display Batch OM Errors Screen.
Advance to standard order inquiry	Select Order Inquiry for an error record to advance to Order Inquiry Header Screen or the Order Inquiry Detail Screen for the related order, depending on the setting of the Default Version for Order Inquiry (C34) system control value.
Print a listing of the errors for this maintenance or cancel request	Select Error List to print the E-Commerce Order Maintenance Errors Report, including all errors for this cancel request only.

Display Batch OM Detail Screen

Purpose: Use this screen to review detail information on a cancel line request from the web storefront that is in error.

How to display this screen: Select Display for a detail line at the Display Batch OM Transactions Screen (Detail).

Field	Description
Order number	The order and line number that a customer has attempted to cancel from the web storefront. The order ship-to address is separated from the order number by a hyphen, and the order line number follows: order number - ship-to number - order line number Order number: numeric, 8 positions; display-only. Ship-to number: numeric, 3 positions; display-only. Order line number: numeric, 3 positions; display-only.

Field	Description
Activity	The action that the customer has attempted to perform against the order detail line. The only valid value is: Line cancellation = Reduce the quantity of the order detail line or cancel it entirely Display-only.
Item/SKU	The item that the customer has attempted to cancel. The system determines which item the customer has selected by the order detail line (when working with an existing order detail line) or the short SKU number (when adding a new item to the order). The short SKU number is stored in the SKU table. Alphanumeric, 12 positions; display-only.
Quantity	The quantity of the item that the customer has attempted to cancel. Numeric, 3 positions; display-only.
Cancel reason	The cancel reason code specified in the cancel request to describe why the customer wants to cancel or reduce the quantity of the order detail line. This information is included only for a detail-level cancel request. Numeric, 2 positions; display-only.

Display Batch OM Errors Screen

Purpose: Use this screen to review the errors that have prevented a cancel request from being processed.

How to display this screen: Select Errors for an error record at the Work with Batch OM Transactions Screen, or select Errors at the Display Batch OM Transactions Screen (Header) or the Display Batch OM Transactions Screen (Detail).

Field	Description
Order number	An order that a customer has attempted to cancel from the web storefront. The order ship-to number is separated from the order number by a hyphen. Order number: numeric, 8 positions; display-only. Ship-to number: numeric, 3 positions; display-only.
Line number	The order detail number associated with the error. This field is blank if the error is associated with header-level information, or if the system could not determine which line number was involved. Numeric, 3 positions; display-only.
Error description	The description of the error that prevented the cancel request from being processed. See Batch Order Cancel Errors. Alphanumeric, 25 positions; display-only.
Notes	For certain errors, this field displays the description of the error that prevented the maintenance or cancel request from being processed. If the error is the result of an item on the order that already existed and was not part of the maintenance or cancel request, the message is: Error from a line that was not maintained.

Screen Option	Procedure
Print a listing of the errors for this cancel request	Select Error List to print the E-Commerce Order Maintenance Errors Report, including all errors for this cancel request only.

Batch Order Cancel Errors

Error Message	Occurs When:
Detail Errors	
Invalid Order Detail	The order line number specified in the cancel request does not exist on the order.
Line is not Open	The order line has a status of X (closed).
Pick Exists for Line	There is currently a printed pick slip for the order line.
Cpn Item Required	The order line specified for cancellation is required for an order-level coupon. See Working with Coupon Promotions (WCPR) for more information on coupons. **Note:** Although the error is retained for review, the system does cancel the order line and does not automatically remove the coupon from the order.
Order Tot < Cpn Requires	The cancel request has reduced the order total below the minimum required for a coupon on the order. See Working with Coupon Promotions (WCPR) for more information on coupons. Note: • Although the error is retained for review, the system does not automatically remove the coupon from the order. • This error is listed on the Display Batch OM Errors Screen for each order detail line on the order.
Invalid Transactions	The cancel type is missing or invalid.
Header Errors	
Order Has Picks Open	Any order detail lines on the order have pick slips printed or are assigned to Order Orchestration for fulfillment.
Order In Use	The order is locked from update because a user is maintaining it, or another process on the system is updating it. Use Unlocking a Stranded Order or Batch (MULO) to unlock the order.
Order Not Open or Held	The order status is not open (blank) or held (H).
Invalid Cancel Quantity	The quantity specified in the cancel request exceeds the quantity eligible for cancellation for the order detail line.
Invalid Cancel Reason	The cancel reason is not valid, as defined through Establishing Cancel Reason Codes (WCNR).
Invalid Order Ship To	• The order ID in the cancellation request is missing or invalid. • The order ship to in the cancellation request is missing or invalid for the order.

Downloading E-Commerce Offer Files (EOFR)

Purpose: Use the Download E-Commerce Offer Files menu option to select offer, source, and item-related information for download to the web storefront. Typically, this type of information changes periodically.

You can download all three types of information at once, or selected types as needed.

Type of download: The setting of the Generate E-Commerce Offer Tables (M29) system control value defines the output of the e-commerce offer download.

- If this system control value is selected, the e-commerce offer download (EOFR) populates the E-Commerce Offer Staging tables; see Offer-Related Table Extract Summary.
- If this system control value is unselected, the e-commerce offer download (EOFR) generates the E-Commerce Product Web XML File (ProductWeb).

Additional downloads: Other downloads available for the e-commerce interface are:

- static tables
- item availability and item changes

For more information: See:

- the E-Commerce Integration Manual for information on the storefront database schema.

In this topic:

- Process E-Commerce Downloads Screen
- Offer-Related Table Extract Summary
- E-Commerce Product Web XML File (ProductWeb)

Process E-Commerce Downloads Screen

How to display this screen: Enter EOFR in the Fast path field at the top of any menu, or select Download E-Commerce Offer Tables from a menu.

> **Note:**
>
> All records in each related table for your company will be selected for download, unless noted otherwise in the field descriptions.

Field	Description
Offers	Indicates whether to include the selected offer information in the e-commerce offer download for subsequent transfer to the web storefront. Only the offer(s) you enter at this screen will be included. Valid values are: Selected (default) = download the selected offer(s). Unselected = do not download the offer(s).
Sources	Indicates whether to include source codes associated with the selected offer in the e-commerce offer download for subsequent transfer to the web storefront. Only source codes associated with the offer you enter at the From offer field will be included. Valid values are: Selected (default) = include source codes associated with the selected offer. Unselected = do not include source codes.

Field	Description
All items	Indicates whether to include all items, SKUs, and all other related offer information in the e-commerce offer download for subsequent transfer to the web storefront. All items related to the offer(s) you enter at this screen will be included. Valid values are: Selected (default) = include item-related information for all items associated with the selected offer(s). Unselected = do not include item-related information for all items. Select either this field or the New items field, but not both. If you select both fields, the following message displays: Either All Items or New Items can be processed but not both.
New items	Indicates whether to include only new items in the e-commerce offer download for subsequent transfer to the web storefront. Only items related to the offer(s) you enter at this screen and which have not previously been extracted will be selected. Valid values are: Selected = The e-commerce offer download includes item-related information for only new items associated with the selected offer(s); only items which have not been previously extracted are included in the download. When you submit the download, the system updates the Ecommerce Extract Date field in the Item Offer table with the date of the extract; the system uses this field to determine whether the item has previously been included in an e-commerce offer download. Unselected (default) = do restrict extract of item-related information to only new items. Select either this field or the All items field, but not both. If you select both fields, the following message displays: Either All Items or New Items can be processed but not both.
Future prices	Indicates whether to include the latest future price for an item or SKU in the selected offer(s), or the most current price that is not in the future. Valid values are: Selected = include the latest future prices for items and SKUs in the selected offer(s). Future prices are those whose Effective dates are later than the current date. If there are no future prices for an item or SKU, the job includes the latest current price (the most current price whose Effective date is not in the future). Unselected (default) = include the most current price for items and SKUs in the selected offer(s), as long as the prices' Effective dates are not later than the current date. If there are no prices for an item or SKU except for future prices, the job does not include the item or SKU in the extract.

Field	Description
All SKU offers	Indicates whether to include all SKU Offers and SKU Prices, regardless of whether they are different from the Item offer and Item Price. Valid values are: Selected = include all existing SKU Offer and SKU Price information, even if it is identical to the corresponding Item Offer and Item Price information. Unselected (default) = include SKU Offer and SKU Price information only if it differs from the Item Offer and Item Price information: • SKU Price information is updated only if the SKU Price differs from the Item Price. **Note:** The SKU Price is included only if the regular price differs from the Item Price. If the Associate price alone differs, then the SKU Price record is not selected for extract. • SKU Offer information is updated only if the special handling or gift wrap information for the SKU Offer is different from the Item Offer. • This field displays only if the Generate E-Commerce Offer Tables (M29) system control value is selected.
Offer	Enter one or more offers to download to the web storefront. As you enter each offer, its description, start date, and end date are displayed below. You must specify at least one offer. Only the offer(s) you enter and tables associated with the selected offer(s) will be included in the extract. Offer codes are defined in and validated against the Offer table. See Working with Offers (WOFR). Alphanumeric, 3 positions; required.
Description	The description of an offer you have specified for download to the web storefront. Alphanumeric, 30 positions; display-only.
Start date	The first date when the selected offer is effective for processing orders. From the Offer date range specified for the offer. Numeric, 6 positions (in user date format); display-only.
End date	The last date when the selected offer is effective for processing orders. From the Offer date range specified for the offer. Numeric, 6 positions (in user date format); display-only.

Instructions:

#	Step
1.	Optionally reset any of the fields to exclude related information from selection. **Note:** Select either the All items field or the New items field. You cannot select both fields.
2.	Use the Offer field to specify at least one offer to include in the extract. The system validates each entry, and displays the offer’s description and effective dates below after each.
3.	Select OK. The system validates your entries and highlights any fields you need to correct. Correct any fields and select OK again.

#	Step
4.	Select Submit to submit the extract. The system displays the following message: E-Commerce download submitted to batch. Also, the system submits the job ECOMM_OFR, which extracts the selected information for download.
5.	The setting of the Generate E-Commerce Offer Tables (M29) system control value defines the output of the e-commerce offer download. • If this system control value is selected, the e-commerce offer download (EOFR) populates the E-Commerce Offer Staging tables; see Offer-Related Table Extract Summary for a listing of the information included in the extract. • If this system control value is unselected, the e-commerce offer download (EOFR) generates the E-Commerce Product Web XML File (ProductWeb). Note: If an active procedure exists, the system does not generate the ProductWeb file and instead writes an error message to the Application Log.

Offer-Related Table Extract Summary

Purpose: This table provides a summary of the tables and fields included in the offer table extract, and how they map to the e-commerce staging tables. The system populates these tables when you submit the e-commerce offer download and the Generate E-Commerce Offer Tables (M29) system control value is selected.

Information included: The e-commerce offer download adds new information to the staging tables if the tables have not been cleared since the last download; it does not update records once they are extracted to the staging tables. However, once the records are downloaded to the web storefront and cleared from the staging tables, changes to existing records are eligible to be extracted to the staging tables and passed to the storefront.

Removing items and offers:

All SKUs included? SKU-level information is included in the extract only if there is a SKU Offer and SKU Price record. For example, you can use the Creating Item/SKU Offers (MISO) menu option to create SKU Offers and SKU Prices for an item when you add it to a new offer. SKU-level offer and price information is included in the extract if you select the All SKU offers option when generating the extract; otherwise, SKU Offers are included only when they differ from the item-level information, such as a special handling or price that differs from the Item Offer or Item Price setting.

Future prices? The Future prices field on the Process E-Commerce Downloads screen controls whether to download the most current prices whose Effective dates are not in the future, or the latest prices whose Effective dates are later than the current date. If you would like to download both current and future prices, you can run the download job twice, resetting this field as needed.

Example: AB100 BLUE LRGE has the following prices set up for the selected offer(s):

Date	Quantity	Price
1/1	1	10.00
1/1	5	9.00
1/10	1	10.50
2/1	1	8.50

Date	Quantity	Price
2/1	5	7.50
3/1	1	7.00
3/1	5	6.99
	1. The current date is 1/15. If you run the extract job with the Future prices field unselected, the job selects the following prices:	
1/1	5	9.00 (most recent price for this quantity not greater than current date)
1/10	1	10.50 (most recent price for this quantity not greater than the current date)
	2. The current date is 1/15. If you run the extract job with the Future prices field selected, the job selects the following prices:	
3/1	1	7.00 (latest future price for this quantity)
3/1	5	6.99 (latest future price for this quantity)

Note:

- Item or SKU prices are included in the following extract tables (see Offer-Related Table Extract Summary for more information):
  - EC Item Breakpoint (EXIPRC): includes single-unit and multi-unit prices at the item level
  - EC Offer Item Link (EXIOFL): includes single-unit prices at the item level
  - EC Offer SKU Link (EXSOFL): includes single-unit prices at the SKU level
  - EC SKU Breakpoint (EXSPRC): includes single-unit and multi-unit prices at the SKU level
- If you run the extract job with the Future prices field selected, but there is no future price for the item or SKU, the job extracts the most recent price instead.
- If you run the extract job with the Future prices field unselected, but there is no current price for an item or SKU and just a future price, the extract omits the item or SKU prices from the extract, with the exception of the EC Offer Item Link table; this table includes a record for the item with a price of 0.

> **Note:**
>
> Clear the records from each target table before running the extract to make sure that you capture the most up-to-date information from Order Administration, as the extract process does not always write updated information in the extract table if there is already an existing record.

Selection for download: All item-related information (such as hazard codes and e-commerce categories) are selected for download only if they are assigned to items that are selected for download.

OROACS Table	Staging Table	Fields	Additional Information
If you select the Offer field at the Process E-Commerce Downloads screen:			
Offer (MSOFFR)	EC Offer (EXOFFR)	Company code Offer code Description Start date End date	Only the offer(s) you indicate at the screen is/are selected. See Working with Offers (WOFR).
If you select the Sources field at the Process E-Commerce Downloads screen:			
Source (MSSRC)	EC Source (EXSRCE)	Company code Source code Source code description Discount percentage Offer	See Working with Source Codes (WSRC).
If you select the Items or New Items field at the Process E-Commerce Downloads screen:			
Long SKU Class (INLSKC) OR Retail Class (INRTCP)	EC Class (EXCLAS)	Company code Long SKU department code Long SKU class code Long SKU class description	A long SKU class is selected for download only if it is assigned to an item selected for download, and the item is also assigned a long SKU department. The same long SKU class can be downloaded multiple times, if it is paired with different long SKU departments. See Working with Long SKU Classes (WLSC). **Note:** If you select the Use Retail Integration (H26) system control value, the interface uses the Retail Class table to populate the EC Class table.

OROACS Table	Staging Table	Fields	Additional Information
Item Coordinate (INITCO)	EC Cross-Sell (EXCSEL)	Company code Item code Cross-sell item code Cross-sell description Coordinate sequence Coordinate type	An item coordinate is selected for download only if the primary item (Note: not necessarily the coordinate item) is selected for download. Also, only the first 50 positions of the item coordinate description (a 70-position field) is included in the Cross-sell description. See \Working with Item Coordinates (WCIO).
Long SKU Department (INLSKD)	EC Department (EXDEPT)	Company code Long SKU department code Long SKU department description	See Working with Long SKU Departments (WLSD).
Shipper/Item (OESHIM)	EC Extra Shipping (EXSCIT)	Company code Ship via code Item code Extra shipping charge	See Working with Ship Via Codes (WVIA).
Hazard (INHZRD)	EC Hazard (EXHAZA)	Company code Hazard code Hazard description	See Working with Hazardous Item Codes (WHAZ).

OROACS Table	Staging Table	Fields	Additional Information
Item (INITEM)	EC Item (EXITEM)	Company code Item code Item description Height Length Width Selling quantity Shipping weight Unit of measure code Vendor number Second language description SKU? (**0**=N, **1**=Y) Active on web? (**0**=N, **1**=Y) Long SKU department Long SKU class Long SKU category Hazard code User fields 1 through 4 Status	Each non-SKU'd item associated with a selected offer(s) (that is, there is an item/offer assignment) is selected for download. SKU'd items are also included in the selection if they have item/offer assignments. See the Create Item Screen for field descriptions. **Note:** The *Active on web?* flag is not currently used.
Item Offer (INIOFR)	EC Item (EXITEM)	Allow gift wrap? (**0**=N, **1**=Y)	See the Create Item Offer Screen.
SKU (INSKU)	EC Item (EXITEM)	List price	The Original price in the EC Item table is from the highest List price for all SKUs.
Item Price (INIPRC)	EC Item Breakpoint (EXIPRC)	Company code Offer code Item code Breakpoint quantity Price	You set up a price breakpoint for a quantity of 1 when you create an item/offer assignment and specify a price. You can also specify additional price breakpoints for larger quantities. The extract includes the latest current or future price (based on the Future prices field), for each item-level quantity breakpoint. See: • above under Downloading E-Commerce Offer Files (EOFR) for a discussion of current or future prices • the Create Item Offer Screen for information on assigning items to offers at item creation Assigning Items/SKUs to Offers for information on working with item/offer assignment, including working with quantity price breaks

OROACS Table	Staging Table	Fields	Additional Information
Item Offer (INIOFR)	EC Offer Item Link (EXIOFL)	Company code Offer code Item code Price (single unit) Special handling price Item alias Gift wrap price Custom special handling format code	The extract includes the latest current or future price (based on the Future prices field), for each single-unit item-level price. See: • above under Downloading E-Commerce Offer Files (EOFR) for a discussion of current or future prices • the Create Item Offer Screen for information on assigning items to offers at item creation
SKU Offer (INSKOF)	EC Offer SKU Link (EXSOFL)	Company code Offer code Item code Short SKU Price (single-unit) Special handling price Gift wrap price Custom special handling format code	A SKU/offer is selected for download only if the special handling or gift wrap information differs from the item/offer, or if you select the All SKU offers option when generating the extract. The extract includes the latest current or future price (based on the Future prices field), for each single-unit SKU-level price. See: • above under Downloading E-Commerce Offer Files (EOFR) for a discussion of current or future prices • the Create SKU Offer Screen for information on assigning SKUs to offers **Note:** The Short SKU is stored in the SKU table and is a 7-position number used to identify SKUs and items. You can view the short SKU on display screens in Work with Items (MITM) and Inventory Inquiry (DINI). See Create Item (Base Information) Screen.

OROACS Table	Staging Table	Fields	Additional Information
SKU (INSKU)	EC SKU (EXSKU)	Company code Item code Short SKU (assigned by the system at SKU creation) SKU code SKU description SKU element 1 through 3 SKU element 1 through 3 description Restrict orders? (**0**=N, **1**=Y) User fields 1 through 5 Soldout control code Status UPC codes (first two)	A SKU is selected for download only if it has a SKU/offer selected for download (because it differs from the item/offer, as described above). Non-SKU'd items are also selected for download in this table. **Note:** The Short SKU is stored in the SKU table and is a 7-position number used to identify SKUs and items. You can view the short SKU on display screens in Work with Items (MITM) and Inventory Inquiry (DINI). See the Create Item (Base Information) Screen or the Create SKU 1 of 2 (With Overrides) Screen and the Create SKU 2 of 2 (With Overrides) Screen.
SKU Price (INSPRC)	EC SKU Breakpoint (EXSPRC)	Company code Offer code Item code Short SKU (assigned by the system at SKU creation) Breakpoint quantity Price	A SKU price is selected for download only if the SKU-level offer price differs from the Item Offer price, or if you select the All SKU offers option when generating the extract). The extract includes the latest current or future price (based on the Future prices field), for each SKU-level quantity breakpoint. See: • above under Downloading E-Commerce Offer Files (EOFR) for a discussion of current or future prices • Note above for information on Short SKUs • the Create SKU Offer Screen for information on assigning SKUs to offers Assigning Items/SKUs to Offers **for information on working with item/offer assignment, including working with quantity price breaks**
Keyword (INKWDP)	EC Keyword (EXKEYW)	Company code Item code Keyword	See Working with Item Keywords (WKEY).

OROACS Table	Staging Table	Fields	Additional Information
Page Letter Alias (INPLAL)	EC Alias Item (EXITMA)	Company code Item code Offer Alias item	Order Administration includes all item aliases for an item for the offer selected in the e-commerce download. See Assigning Items/SKUs to Offers.
Item Ship Via Override (INISVO)	EC Item Ship Via Override (EXISVO)	Company code Item number Shipping code	Order Administration only populates this table if records exist in the Item Ship Via Override table for an item. See Working with Item Ship Via Overrides.

E-Commerce Product Web XML File (ProductWeb)

Purpose: The E-Commerce Product Web XML file (ProductWeb) contains item offer information for the offers selected to download on the Process E-Commerce Downloads Screen. The system generates this file when Downloading E-Commerce Offer Files (EOFR) if the Generate E-Commerce Offer Tables (M29) system control value is unselected.
The e-commerce offer download creates a zip file in the OMS-ECOMMERCE container of the FILE_STORAGE table. The zip file contains the E-Commerce Product Web XML File (ProductWeb). Use the file storage API to download the file. See the File Storage API for background.

Name of file: The name of the file is ProductWeb_999_YYMMDDHHMMSS.xml, where 999 is the company code where you submitted the e-commerce offer download and YYMMDDHHMMSS is the date and time when the download occurred. When the file storage API is enabled, the file is saved in a zip file with the same name except for the .zip extension.

XML version: The ECOMMERCE_PRODUCT_XML_VERSION in Working with Customer Properties (PROP) defines the XML version of the ProductWeb XML file.

ECommerce extract date: For each item offer included in the ProductWeb XML file, the system updates the ECommerce Extract Date field in the Item Offer table with the date when the e-commerce offer download was submitted. The system uses this date if you select to include only new items in the e-commerce offer download to determine which items are new and which items have previously been downloaded.

Application log: The system writes any messages related to the e-commerce offer download to the Application Log.

Active procedure: The system creates an active procedure while the ProductWeb file is generated; once the e-commerce offer download process completes, the system clears the active procedure.

More information: See the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1) for more information on the E-Commerce Product Web XML File.

Working with E-Mail Notification Templates (WEMT)

Purpose: Use this menu option to work with the default text to include when you send email notifications:

- first, second, and continue backorder notices

- credit card credit acknowledgments
- Contact us” requests
- credit card decline notifications
- loyalty membership activations and deactivations
- Oracle Retail Customer Engagement loyalty registration notices
- membership cancellation notifications
- order confirmations
- purchase orders
- return confirmations
- shipment confirmations
- soldout notifications
- store pickup notifications
- stored value card notifications
- quote confirmations
- order cancellation confirmations
- order line cancellation confirmations
- cancellation attempt failure notices

The system automatically creates templates for each of the above at the company level, but the templates are blank until you specify the text for each email.

General email setup: See *Email Generation Setup* for more information on how to configure Order Administration for email generation.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Email formats: Most of the system-generated emails are in HTML format; however, the purchase order and loyalty activation/deactivate notices are in simple text. See HTML Format Notification Samples and Contents and Simple Format Notification Sample for examples.

Outbound email API: You can specify generation of a generic outbound XML message, rather than an actual email, for all notifications except the loyalty activation/deactivation and purchase orders. The customer service emails use the simple text format, and the purchase order form is attached to a plain-text email.

The XML message includes additional information that is not included in the standard email notice. You might choose to generate the XML message so that you can use the information to produce a reformatted HTML email that includes promotional content. See *Outbound Email API* for an overview.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

In this topic:

- Summary of Customer Correspondence
- When Does the System Generate an Email Notification?
  - Order Confirmation Emails

For more information: See:

- Setup overview: *Email Generation Setup* provides an overview on setup, a listing of related system control values, and troubleshooting information.
- Which text template? Email Text Templates describes the hierarchy that controls which text template to use for notifications.
- Which "from" email address? "From" Email Address" describes the hierarchy that controls how to determine the "from" email address to use for emails.

- Actual email or CWEmailOut? HTML Email or Outbound Email XML Message? describes the hierarchy that controls whether to generate an actual email or the *Outbound Email XML Message (CWEmailOut)*.
- Controlling individual notification types by order type: Generate Notifications? describes how to control the generation of different types of notifications for an order type.
- Settings and overrides by order type: Establishing Order Types (WOTY) describes setup options by order type.
- Settings and overrides by entity or entity/order type: Working with Entities (WENT) describes setup options by entity and entity/order type.
- *Outbound Email API* describes the CWEmailOut message generation and contents, and includes a sample of each notification type.
- Testing email generation: Testing Email Generation (UEML)

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Summary of Customer Correspondence

The table below provides a summary of the customer correspondence generated by the system. See Work with E-Mail Template Screen for a listing of the information included in each type of generated email notice.

Generated Output	Generated Through:	Subject Line	Contents
Backorder 1st, 2nd, or Continue Notice			
email (HTML format), XML, or printed	Generate Backorder Notices (GBOC)	Backorder - order#:99999999	See Backorder Notification Email Sample and Contents.
“Contact us” notice			

Generated Output	Generated Through:	Subject Line	Contents
email (HTML format) or XML	Selecting the Send Contact Us Email option at the Display More Options Screen in order entry, inquiry, or maintenance. This option is available only if: • there is an email address for the customer, and • the customer's opt-in/ opt-out setting is O1 (email is preferred communication) or O2 (send order-related email only), and • the Contact Us Email Program (K54) system control value specifies an email program. **Note:** You can generate this email regardless of the setting of the Email notification flag for the order type.	Contact Us - Order#:99999999	See "Contact Us" Notification Sample and Contents.
Credit Card Credit Acknowledgement			
email (HTML format) XML, or printed	Processing Refunds (MREF) **and** Processing Refunds by Order Number (MRFO)	Credit Ack. - Order #99999999	See Credit Card Credit Acknowledgement Email Sample and Contents.
Credit Card Decline Notice			
email (HTML format) or XML	Streamlined Pick Slip Generation (WSPS) **and the REAUTH periodic function (see** REAUTH Processing**)**	Credit Card Decline - Order #99999999	See Credit Card Decline Notification Sample and Contents.
Loyalty Activate Notice and Loyalty Deactivate Notice			

Generated Output	Generated Through:	Subject Line	Contents
email only	BILL_ASYNC and ORDR_ASYNC processes in Using the ASYNC Jobs (MBJC)	Loyalty Activation or Loyalty Deactivation **Note:** The word "Loyalty" is replaced with the value in the Alternate Customer Number Label Description (H95) system control value, if any.	• sold-to customer name • sold-to customer number • loyalty program description • loyalty program membership ID
Oracle Retail Customer Engagement Loyalty Registration Notification			
email (HTML format) or XML	Registering a Customer in the Customer Engagement Loyalty Program	Loyalty Registration Notification	See Oracle Retail Customer Engagement Loyalty Registration Notification Sample and Contents.
Maintenance Failure			
email (HTML format) or XML	E-Commerce Cancel Process	Cancellation Request Failure - Order #999999	See Cancellation Request Failure Email Sample and Contents.
Membership Cancellation			
email (HTML format) or XML	cancelling a customer membership through the Working with Customer Memberships (WWCM)	Membership Cancellation	See Membership Cancellation Notification Sample and Contents.
Quote Confirmation			
email (HTML format) or XML	Select the Email Quote option on the Print/ Email Quote Window	Quote Confirmation - Quote # 99999999	See Quote Confirmation Email Sample and Contents.
Order Cancellation Confirmation			
email (HTML format) or XML	ORDR_ASYNC process in Using the ASYNC Jobs (MBJC)	Order Cancellation - Order# 99999999	See Order Cancellation Confirmation Email Sample and Contents.
Order Confirmation			

Generated Output	Generated Through:	Subject Line	Contents
email (HTML format) or XML	• accepting an order in interactive Order Entry. • processing an order through the order API, including orders in error if the Suppress Order Confirmations for Orders in Error (K09) system control value is unselected. • accepting and processing a corrected order batch, if an order confirmation has not previously been generated for the order ship to. • the ORDR_ASYNC job if an order confirmation has not previously been generated for the order ship to.	Order Confirmation - Order# 99999999	See Order Confirmation Email Sample and Contents.
Order Line Cancellation Confirmation			
email (HTML format) or XML	ORDR_ASYNC process in Using the ASYNC Jobs (MBJC)	Order Line Cancellation - Order# 99999999	See Order Line Cancellation Confirmation Email Sample and Contents.
Return Confirmation			
email (HTML format) or XML	• billing if the Send Shipment Confirmation from Billing (L98) system control value is selected • Sending Internet Order Ship Confirmation (ESCF)ECSHCNF peri odic function	Return Conf. - Order #99999999	See Return Confirmation Email Sample and Contents.
Shipment Confirmation			

Generated Output	Generated Through:	Subject Line	Contents
email (HTML format) or XML	• billing if the Send Shipment Confirmation from Billing (L98) system control value is selected • Sending Internet Order Ship Confirmation (ESCF)ECSHCNF periodic function	Ship Conf. - Order #99999999	See Shipment Confirmation Email Sample and Contents.
Soldout Notification			
email (HTML format) XML, or printed	Generating Soldout Notifications (MSON)	Soldout - Order #99999999	See Soldout Notification Email Sample and Contents.
Store Pickup Notification **Note:** Order Orchestration's Store Connect module does not use this notification email; instead, you can use Order Orchestration to generate a notification to the customer.			
email (HTML format) or XML	Email Request Message (CWEmailRequest)	Order Ready for Pickup - Order# 99999999	See Store Pickup Notification Sample and Contents.
Stored Value Card Notification			
email (HTML format) or XML	SVC_OUT process in Working with Integration Layer Processes (IJCT)	Stored Value Card Notification	See Stored Value Card Notification Sample and Contents.
Gift Acknowledgement			
printed only	Pick slip generation or billing, depending on the setting of the Automatic Generation of Gift Acknowledgement (B92) system control value	N/A	See Gift Acknowledgement.
Pick Slips			
printed only	Streamlined Pick Slip Generation (WSPS)	N/A	See Pick Slip.

Generated Output	Generated Through:	Subject Line	Contents
Drop Ship Pick Slips			
printed only	Selecting Vendors for Drop Ship Processing (MDSP)	N/A	See Drop Ship Pick Slip/Invoice.
Refund Checks			
printed only	Processing Refunds (MREF)	N/A	See Refund Check.

When Does the System Generate an Email Notification?

- Order Confirmation Emails
- Shipment and Return Confirmation Emails
- Stored Value Card Notification Emails
- Quote Confirmation Emails
- Purchase Order Emails
- Oracle Retail Customer Engagement Loyalty Registration Notifications
- Other Email Notifications

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

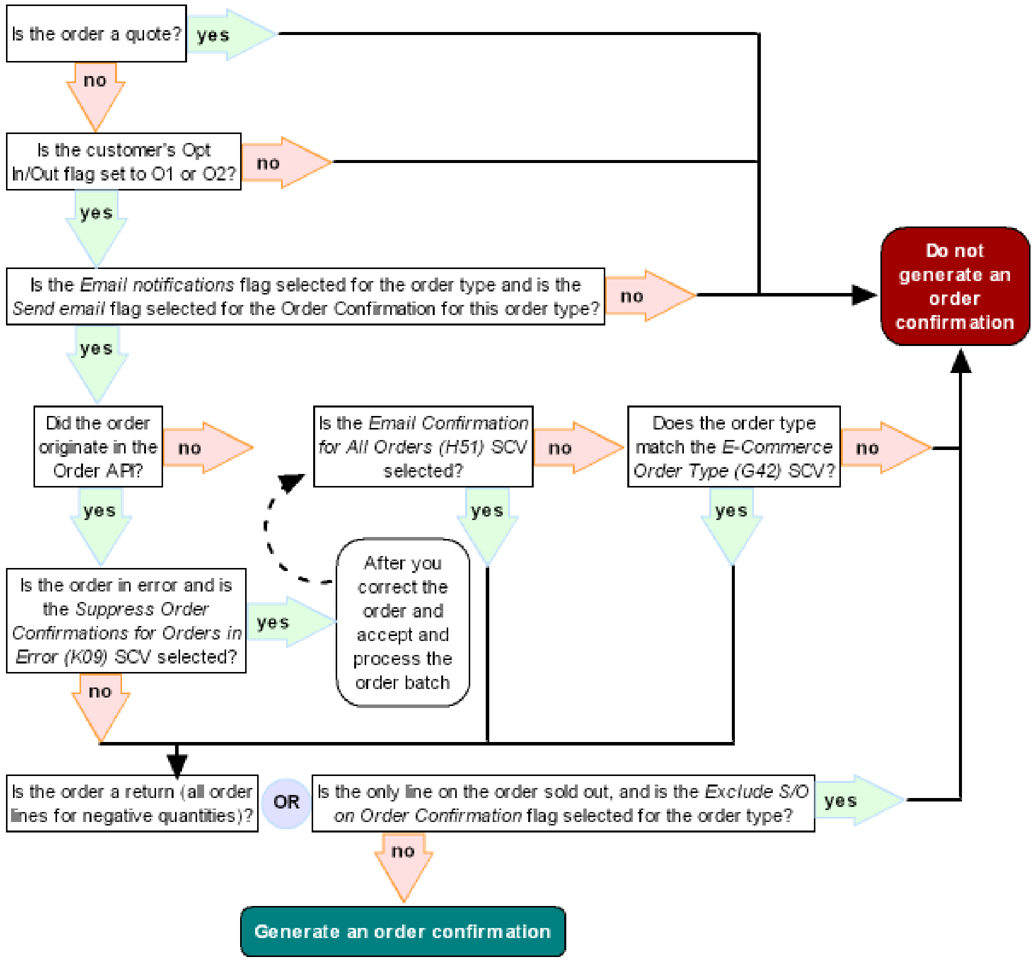
Order Confirmation Emails

An order is eligible for an order confirmation email or *Outbound Email XML Message (CWEmailOut)* if:

- the order is not a quote, and
- the Email notification flag for the order type is selected, and,
- the Send email flag for the Order Confirmation is selected for the order type at the Order Type Email Selection Screen, and
- the customer's Opt-in/out setting (see Determining the Opt-in/out Setting) is O1 or O2, and
- the customer has an Email address; and,
- the order includes one or more lines with a positive quantity, and
- the order includes lines other than a soldout item, or the Exclude S/O on order confirmation is unselected, and
  - the E-Mail Order Confirmations for All Orders (H51) is selected, or
  - the order type matches the E-Commerce Order Type (G42).

> **Note:**
>
> - If you delete the email address and the Suppress Email Address Search (J09) system control value is selected, the system does not generate order-related emails for the order. See that system control value for more information.
> - The system does not confirm that the customer's email address is a valid, existing address.
> - The XML only? flag for the Order Confirmation template used (at either the entity or company level) controls whether you generate an actual email notification or the *Outbound Email XML Message (CWEmailOut)*.
> - To generate an actual email (rather than the *Outbound Email XML Message (CWEmailOut)*), you need to have the Order Acknowledgement Program (G50) system control value set to OrdConf or to the name of your unique HTML-based email program. To generate the *Outbound Email XML Message (CWEmailOut)*, you have to set the system control value to any value, but it cannot be blank.
> - If the Suppress Order Confirmations for Orders in Error (K09) system control value is unselected and there are any errors on the order, the generated email might not be formatted correctly. For example, if there is not sufficient valid information for the shipping address on the order, this name and address are omitted from the generated email.
> - If the order includes multiple shipping addresses, the system generates a separate confirmation for each ship-to.
>
> For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

For more information: See Email Setup within Order Administration for more information on the hierarchies that control the email text template and "from" email address for the order confirmation email, and that determine whether to generate the *Outbound Email XML Message (CWEmailOut)* or an actual email.



Generated when? The order confirmation email or *Outbound Email XML Message (CWEmailOut)* is generated automatically when the order is created, either through interactive order entry or the order API (order API orders); however, if an order created through the order API is in error and the Suppress Order Confirmations for Orders in Error (K09) system control value is selected, the order confirmation is not generated until you correct any errors and accept and process the corrected order batch.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

If you enter the order through interactive order entry, the confirmation is not generated while the order is still suspended in a batch. Once you accept the order, the system generates the confirmation.

For more information: See the Order Confirmation Email Sample and Contents.

Shipment and Return Confirmation Emails

The system generates a shipment or return confirmation email or *Outbound Email XML Message (CWEmailOut)* only if:

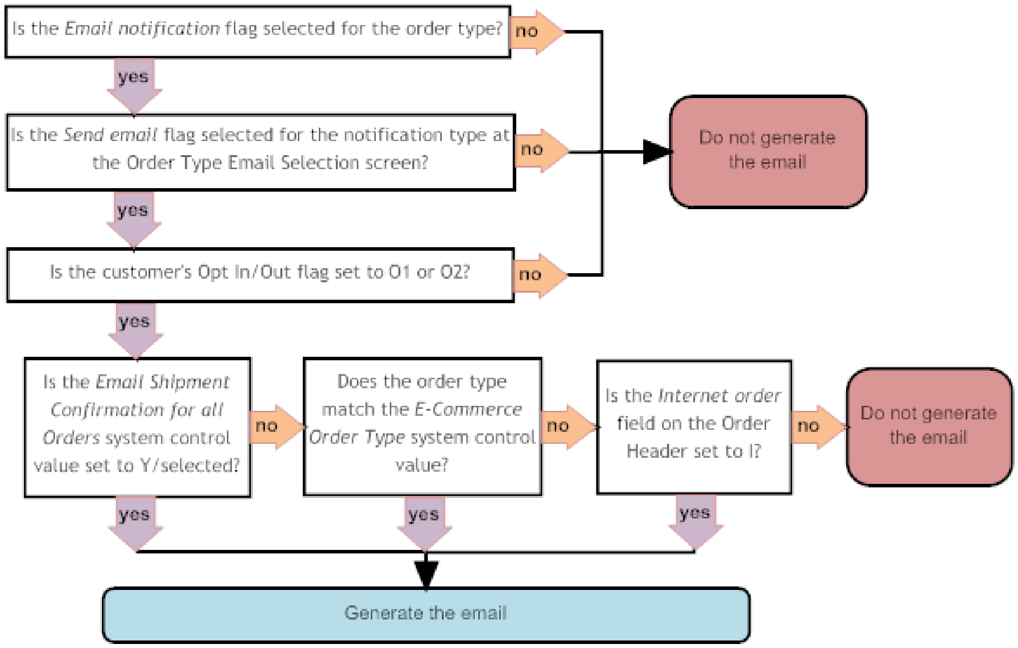
- the Email notification flag for the order type is selected, and,
- the Send email flag for the notification type is selected at the Order Type Email Selection Screen, and
- the customer's Opt-in/out setting (see Determining the Opt-in/out Setting) is O1 or O2, and,

- the customer has an *Email address*, and,
  - the E-Mail Shipment Confirmations for All Orders (H52) system control value is selected, or,
  - the order type matches the Return Disposition Code to Exclude in ORCE Sales Feed (M22), or
  - the Internet order field in the Order Header table is set to I
- for return confirmations, the return disposition code for the return does not match the return disposition code defined in the Return Disposition Code to Exclude in ORCE Sales Feed (M22) system control value and the Suppress refund field in the Order Payment Method table is N or blank.

Note:

- If you delete the email address and the Suppress Email Address Search (J09) system control value is selected, the system does not generate order-related emails for the order. See that system control value for more information.
- The system does not confirm that the customer's email address is a valid, existing address.
- The XML only? flag for the Shipment or Return Confirmation template used (at either the entity or company level) controls whether you generate an actual email notification or the *Outbound Email XML Message (CWEmailOut)*.
- To generate an actual shipment confirmation email (rather than the *Outbound Email XML Message (CWEmailOut)*), you need to have the Shipment Confirmation Program (G51) system control value set to ShpConf or to the name of your unique HTML-based email program.
- Similarly, to generate an actual return confirmation email, you need to set the Return Confirmation E-Mail Program (H53) system control value to RtnConf or to the name of your unique HTML-based email program.
- To generate the *Outbound Email XML Message (CWEmailOut)*, you have to set the system control value to any value, but it cannot be blank.

  For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
- There is a separate shipment confirmation email for each invoice for the order billed on a given date.



You can generate shipment and return confirmation emails or the *Outbound Email XML Message (CWEmailOut)* through:

- billing if the Send Shipment Confirmation from Billing (L98) system control value is selected
- Sending Internet Order Ship Confirmation (ESCF)
- the ECSHCNF periodic function; see Working with Periodic Functions (WPER)
- If you do not consolidate invoices, the system keeps track of the shipment and return confirmation emails that it has generated by invoice number and date so that you can stop and restart email generation for a single date without risk of generating a duplicate email to a customer. See Stopping and Restarting Shipment and Return Confirmation Emails for an overview and more background.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

For more information: See the Shipment Confirmation Email Sample and Contents and Return Confirmation Email Sample and Contents.

Stored Value Card Notification Emails

The system generates a stored value card notification or outbound XML message when the SVC_OUT job processes an approved stored value card activation request if:

- The SVC type field for the stored value card item is E or V.
- An email address is defined for the stored value card recipient. The system uses the Stored Value Card Email Hierarchy to determine the email address to send a Stored Value Card Notification email to the stored value card recipient.
- The Stored Value Card Email Notification Program (I30) system control value specifies a program name. The base program is SVCNOTF.

The system does not look at the Email notification setting for the order type to determine whether to generate an email.

The system does not look at the Email notification setting for the order type to determine whether to generate an email.

Note:

- The system generates this email notification regardless of the setting of the Suppress Email Address Search (J09) system control value.
- The XML only flag for the Stored Value Card notification template used (at either the entity or company level) controls whether you generate an actual email notification or the *Outbound Email XML Message (CWEmailOut)*.
- To generate an actual stored value card confirmation email (rather than the *Outbound Email XML Message (CWEmailOut)Outbound Email XML Message (CWEmailOut)*), you need to have the Stored Value Card Email Notification Program (I30) system control value set to SVCNOTF or to the name of your unique HTML-based email program. To generate the *Outbound Email XML Message (CWEmailOut)*, you have to set the system control value to any value, but it cannot be blank.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Important:

The outbound XML version specified for the EMAIL_OUT process in Working with Integration Layer Processes (IJCT) must be set to at least 4.0 in order to generate email or XML stored value card notifications.

For more information: See Stored Value Card Notification Email for more detail

Quote Confirmation Emails

A pre-order quote is eligible for a quote confirmation email or *Outbound Email XML Message (CWEmailOut)* if:

- the Status of the order is Quote.
- the customer or order has an Email address; and,
- the Quote Confirmation Email Program (K74) system control value contains a valid email program. The base email program for quote confirmations is QUOCONF.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

In addition, for quotes entered through the order API:

- the quote passes web order validation, and
- the Quote field and Email notification field for the order type are selected, and,
- the customer’s Opt-in/out setting (see Determining the Opt-in/out Setting) is O1 or O2

For quotes entered through interactive order entry, the system does not look at the Email notification setting for the order type or at the customer's Opt in/out setting to determine whether to generate the Quote confirmation.

Note:

- The system does not confirm that the customer's email address is a valid, existing address.
- The XML only? flag for the Quote Confirmation template used (at either the entity or company level) controls whether you generate an actual email notification or the *Outbound Email XML Message (CWEmailOut)*.
- To generate an actual email (rather than the *Outbound Email XML Message (CWEmailOut)*), you need to have the Quote Confirmation Email Program (K74) system control value set to QUOCONF or to the name of your unique HTML-based email program. To generate the *Outbound Email XML Message (CWEmailOut)*, you have to set the system control value to any value, but it cannot be blank.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Generated when? The quote confirmation email or *Outbound Email XML Message (CWEmailOut)* is generated when you select the Email Quote option on the Print/Email Quote Window.

The system does not look at the Email notification setting for the order type to determine whether to generate a quote confirmation.

For more information: See the Quote Confirmation Email Sample and Contents.

Membership Cancellations

Generated when? If the Membership Cancellation Email Program (K77) system control value specifies a valid program name, the system generates membership cancellation emails when you cancel a customer membership through Working with Customer Memberships (WWCM). These emails are not generated when you cancel the membership item through order maintenance.

Which entity? The membership's Default source indicates the entity associated with the customer membership for the purposes of determining the email template text.

Loyalty memberships: Email confirmations are also generated for loyalty memberships if you cancel them rather than deactivating them or having the system deactivate them automatically due to order cancellations or returns. Since loyalty memberships are not associated with a specific order or source code, they cannot use an entity-level template, and instead they always use the template set up through the Work with E-Mail Template Screen. Also, since loyalty memberships do not actually generate orders, both the sold-to and ship-to customer indicated in the email identify the customer possessing the loyalty membership.

Customer note: The system writes a customer note, such as Memship Cancel Conf to ejohnson@example.com, when it generates the membership cancellation email or XML message. The user ID associated with the customer note indicates the person who canceled the membership. The note is written even if the email might not actually be deliverable to the customer (for example, if there is a problem with the customer's email address). Also, the note is written for the sold-to customer, even if the notification email was sent to a recipient.

Determining the email address: The email is sent to the email address of the customer ultimately receiving the membership orders, such as the recipient customer or a permanent ship-to address, provided there is a valid email address for that address and the opt-in/out setting is O1 or O2. If there is no alternate shipping address, the email is sent to the customer purchasing the membership. If the customer's opt-in/out setting is O1 or O2 but there is no email address specified, the system writes a message to the APP.log, indicating that the email address is unresolved. See Logs for more information.

The system does look at the Email notification setting for the order type originating the membership, or assigned to generated orders, to determine whether to generate an email.

For more information: See the Membership Cancellation Notification Sample and Contents.

Purchase Order Emails

Generated when? Emailing the purchase order instead of printing it is available when:

- the Email Purchase Order (K80) system control value is selected, and
- the vendor's Email P/O flag is selected, and
- the vendor has a valid Email address.
- **Which menu options support emailing the purchase order?** If the above conditions are true, you can email purchase orders through the Print PO Selection Screen screen in Printing Purchase Orders (MPRP), and through the Print P/O Window in purchase order maintenance and inquiry.

> **Note:**
>
> You cannot email purchase orders through Selecting Vendors for Drop Ship Processing (MDSP).

Separate emails: The system always generates a separate email for each purchase order, even if you select a range of date or purchase orders through Printing Purchase Orders (MPRP).

Which print program is used? In most cases, the .PDF attached to the email is generated with the PO Print Program (C64);; however, if you are using Printing Purchase Orders (MPRP) and print by purchase order number sequence, the PO Print Program for PO Print in PO Sequence (C76) is used.

Email template: The text in the email is derived from the Purchase Order template set up through the Change E-Mail Template Screen in Working with E-Mail Notification Templates (WEMT). Things to note about the Purchase Order template:

- Unlike other email templates, this template is not available at the entity level, since the purchase order is not related to a specific entity.
- The generated email is plain text, with the purchase included as a .PDF attachment. The XML only flag is not available for this template, and you cannot generate the *Outbound Email XML Message (CWEmailOut)*.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

- Because the Purchase Order email does not include any details, you would not normally enter the Text to print below items. If you do so, this text appears several lines below the Text to print above items in the generated email.
- The “from” email address is derived from the company (see Working with Companies (WCMP). If no email address specified for the company, the “from” email address is from the from.email specified through Email Properties.
- The subject of the email is Purchase Order - PO # 1234567, where 1234567 is the purchase order number.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Store Pickup Notifications

The store pickup notification email indicates that a customer’s order is ready for pickup at the selected store. The system generates the store pickup notification when it receives the CWEmailRequest message for an external system, where the order has been assigned, provided that:

- the Email notification field for the order type is selected, and
- the Opt-in/out setting (see Determining the Opt-in/out Setting) for the email address on the order is O1 or O2, and
- there is a valid email generation program specified for the Store Pickup Confirmation Email Program (L48) system control value.

For more information: See:

- Store Pickup Orders for an overview on store pickup orders
- the Store Pickup Confirmation Email Program (L48) and the Email Request Message (CWEmailRequest) for information on when the system generates the notification
- Store Pickup Notification Sample and Contents for a sample email

> **Note:**
>
> Order Orchestration’s Store Connect module does not use this notification email; instead, you can use Order Orchestration to generate a notification to the customer.

Oracle Retail Customer Engagement Loyalty Registration Notifications

The Oracle Retail Customer Engagement loyalty registration notification email indicates that a customer has successfully registered in the Oracle Retail Customer Engagement Loyalty program. The system generates the Oracle Retail Customer Engagement loyalty registration notification when a loyalty card is assigned to a customer while Registering a Customer in the Customer Engagement Loyalty Program, provided that:

- the Opt-in/out setting (see Determining the Opt-in/out Setting) for the email address is O1 or O2, and

- the Oracle Retail Customer Engagement Card Inquiry Response returned from Oracle Retail Customer Engagement contains a loyalty card number, and
- there is a valid email generation program specified for the ORCE Loyalty Registration Notification Email Program (M10) system control value.

For more information: See:

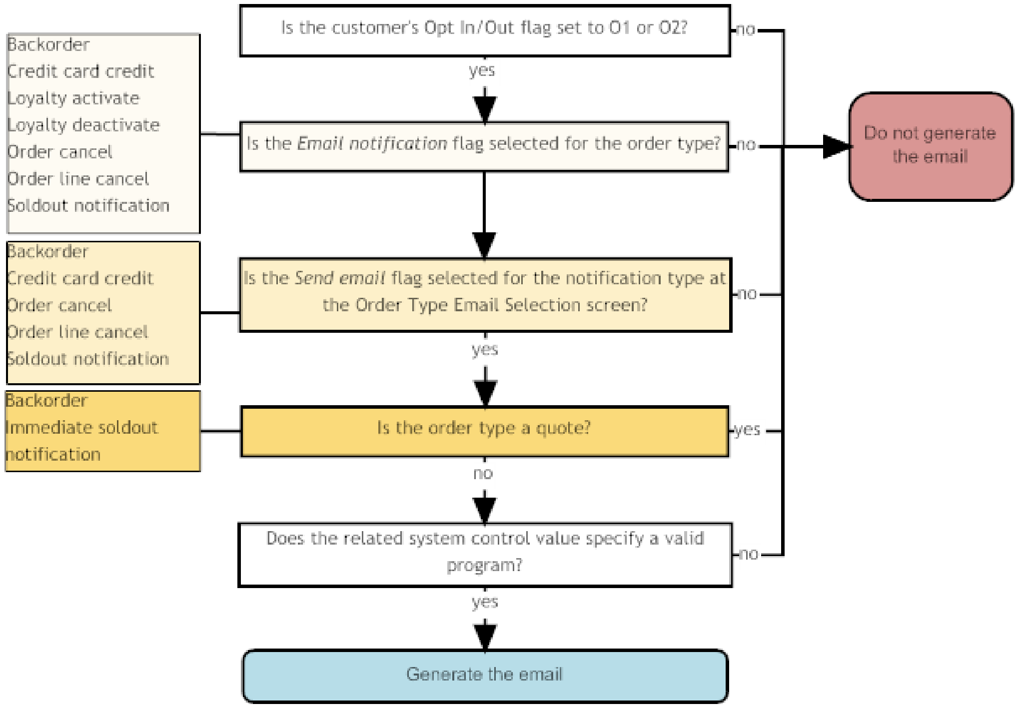
- Customer Engagement Loyalty Integration for an overview on Loyalty processing, including setup.
- the ORCE Loyalty Registration Notification Email Program (M10) for information on when the system generates the notification.
- Oracle Retail Customer Engagement Loyalty Registration Notification Sample and Contents for a sample email.

Other Email Notifications

Backorder, soldout, cancellations, loyalty membership activation or deactivation, credit card credit notifications, “contact us” emails, credit card decline emails, maintenance failure, and order or order line cancellation confirmation emails: The system generates an email, rather than including the notice in a document (if applicable), only when:

- the Email notification field for the order type is selected, and
- if the notification type is listed at the Order Type Email Selection Screen, the Send email flag is selected, and
- the Opt-in/out setting (see Determining the Opt-in/out Setting) for the email address on the order is O1 or O2, and
- there is a valid email generation program specified for the related system control value.

Generation of other notification emails: The rules on generating other emails besides the types called out separately above are illustrated below.



Affected by settings at the order type? The settings at the order type include the Email notification flag and the Send email flag available for selected notifications for that order type. Order type settings control the generation of backorder notices, credit card credit acknowledgements, order or order line cancellation confirmations, and loyalty activation and deactivation notices. Also, the settings control the generation of quote confirmations for orders received through the order API as well as order confirmations and shipment and return confirmations, as described above.

Not affected by settings at the order type: The settings at the order type do not control the generation of membership cancellations, stored value card notifications, “contact us” emails, maintenance failure notifications, or credit card decline notifications.

Note:

- If you delete the email address and the Suppress Email Address Search (J09) system control value is selected, the system does not generate order-related emails for the order. See that system control value for more information.
- The system does not confirm that the customer’s email address is valid.
- The customer API does not generate notification emails when it activates or deactivates a loyalty membership; these emails are generated only as a result of order activity. See *Generic Customer API* and v for more information.
- The XML only? flag for the template used controls whether you generate an actual email notification or the For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).. See Email Setup within Order Administration for more information on how the system determines the setting of the XML only? flag.

- This Email notification flag for the order type does not control email generation for "contact us" emails, loyalty activation or deactivation notices, maintenance failure notices, or credit card decline notices.
- Quotes are not subject to most of the notification types described above; however, the system does generate the soldout notification for a quote if you use Process Auto Soldouts to sell out the item and the quote is otherwise eligible for emails based on the criteria that apply to other order types.

Backorder, soldout, "contact us," credit card credit, and credit card decline notifications:

- To generate an actual notification email (rather than the Outbound Email XML Message (CWEmailOut)), you need to have set the related system control values correctly:

  For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
- the Backorder Notification E-Mail Program (G95) system control value set to BONOTF or to the name of your unique HTML-based email program.
- the Soldout Notification E-Mail Program (G96) must be set to SONOTF or to the name of your unique HTML-based email program.
- the Credit Card Credit Acknowledgement E-Mail Program (H08) must be set to CCCNOTF or to the name of your unique HTML-based email program.
- the Credit Card Decline Email Program (K53) must be set to CDECLNOTF or to the name of your unique HTML-based email program.
- the Contact Us Email Program (K54) must be set to CTUSNOTF or to the name of your unique HTML-based email program. This email is generated on demand, and not produced automatically by the system. See Summary of Customer Correspondence for more information on when the option to generate the "Contact Us" email is available.
- the Order Cancellation Email Program (K78) must be set to ORDCANNOTF or to the name of your unique HTML-based email program.
- the Order Line Cancellation Email Program (K79) must be set to ORDLCANOTF or to the name of your unique HTML-based email program.
- for both the order and order line cancellation emails, the cancel reason code used must not match the Cancel Reason Code to Suppress Email (L08).
- To generate the Outbound Email XML Message (CWEmailOut), you have to set the related system control value to any value, but it cannot be blank.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Determining the Opt-in/out Setting

The system uses the following hierarchy to determine the opt-in/out setting to use when generating emails:

1. Check the Customer Sold To Email Address table for an email address that matches the email address on the order. If there is a match, use that Opt in/Opt out setting; otherwise,
2. Use the customer's Opt in/Opt out setting

Additional Information about Email Notifications

Related system control values: See System Control Values Related to Email Generation for a listing.

Template text hierarchy: See Email Text Templates for information on how the system determines which text template to use. The XML only? setting applied is usually the one from the text template used; see HTML Email or Outbound Email XML Message? for information.

Order history message: The system writes an Order Transaction History message when it generates an email or the *Outbound Email XML Message (CWEmailOut)*. You can review these messages at the Display Order History Screen.

Save in email repository? The Write Outbound Email to Email Repository (H99) system control value controls whether header information on email notifications or the *Outbound Email XML Message (CWEmailOut)* are stored in correspondence history. If the system control value is selected, the system records the correspondence history regardless of whether you generate an actual email or the *Outbound Email XML Message (CWEmailOut)*. See this system control value for more information on identifying and reviewing outbound emails for a customer.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

> **Note:**
>
> The system does not retain the body of outbound emails in correspondence history, only the header information, such as the date, subject, and "to" email address.

Selection hierarchy for the "From" email address: See "From" Email Address for information.

HTML Format Notification Samples and Contents

The system generates HTML format emails for the notification types described below if the XML only? flag for the template is unselected. If the flag is selected, the system generates the *Outbound Email XML Message (CWEmailOut)* instead.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

The contents of each of the HTML emails are derived from the *Outbound Email XML Message (CWEmailOut)*. The EMAIL_OUT process must be set to generate the most recent version of the outbound message in order to generate all of these email notifications correctly.

All other email notification types besides these notification types use the simple format described below under Simple Format Notification Sample.

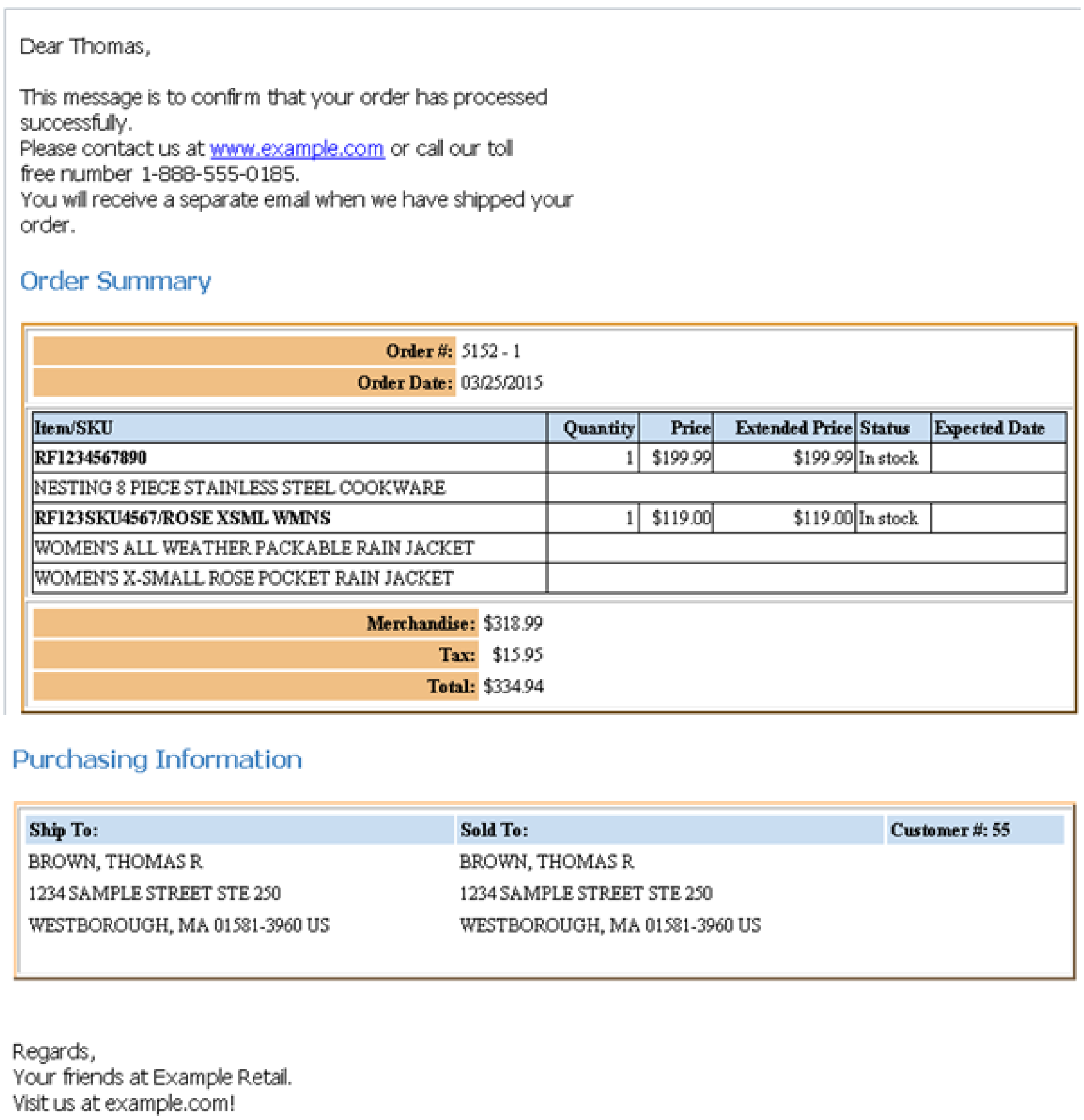
Sample HTML messages:

- Order Confirmation Email Sample and Contents
- Shipment Confirmation Email Sample and Contents
- Return Confirmation Email Sample and Contents
- Backorder Notification Email Sample and Contents
- Credit Card Credit Acknowledgement Email Sample and Contents

- Soldout Notification Email Sample and Contents
- Stored Value Card Notification Sample and Contents
- “Contact Us” Notification Sample and Contents
- Credit Card Decline Notification Sample and Contents
- Quote Confirmation Email Sample and Contents
- Cancellation Request Failure Email Sample and Contents
- Order Cancellation Confirmation Email Sample and Contents
- Order Line Cancellation Confirmation Email Sample and Contents
- Oracle Retail Customer Engagement Loyalty Registration Notification Sample and Contents

Order Confirmation Email Sample and Contents

See Order Confirmation Emails for a discussion on how to generate this email.



Dear Thomas,

This message is to confirm that your order has processed successfully.
Please contact us at www.example.com or call our toll free number 1-888-555-0185.
You will receive a separate email when we have shipped your order.

Order Summary

Order #:	5152 - 1
Order Date:	03/25/2015

Item/SKU	Quantity	Price	Extended Price	Status	Expected Date
RF1234567890	1	$199.99	$199.99	In stock	
NESTING 8 PIECE STAINLESS STEEL COOKWARE					
RF123SKU4567/ROSE XSML WMNS	1	$119.00	$119.00	In stock	
WOMEN'S ALL WEATHER PACKABLE RAIN JACKET					
WOMEN'S X-SMALL ROSE POCKET RAIN JACKET					

Merchandise:	$318.99
Tax:	$15.95
Total:	$334.94

Purchasing Information

Ship To:	Sold To:	Customer #: 55
BROWN, THOMAS R	BROWN, THOMAS R	
1234 SAMPLE STREET STE 250	1234 SAMPLE STREET STE 250	
WESTBOROUGH, MA 01581-3960 US	WESTBOROUGH, MA 01581-3960 US	

Regards,
Your friends at Example Retail.
Visit us at example.com!

Contents: The contents of the order confirmation email are derived from the *Outbound Email XML Message (CWEmailOut)* as follows:

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Preliminary Information:

- greeting: The word Dear followed by the:
- *sold_to_fname*, if any; otherwise,
- *sold_to_fname*, if any; otherwise,
- **Valued customer**

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

> **Note:**
>
> Each of the above is in lower case, with just the first letter of the first word capitalized.

- text: *before_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

Order Summary:

- Order #: *order_nbr* and *order_ship_to*, separated by a hyphen
- Order Date: *order_date*
- for each item/SKU ordered:
  - Item/SKU: *odt_item* and *odt_SKU*, if any, separated by a slash; however, this is the *odt_alias_item* if the customer ordered by alias, regardless of the setting of the Display Item Alias (D56) system control value
  - Quantity: *odt_qty*
  - Price: *odt_price*
  - Extended Price: *odt_extended_price*
  - Status: *odt_availability_msg*; indicates whether the item is: In stock Backordered (including order lines that are not reserved because they have future arrival dates); a brokered backorder being fulfilled through the Order Orchestration Integration (Store Ship); a drop ship (includes an Exp Date); flagged for pickup at a designated store location through the Order Orchestration Integration (Store Pickup); or sold out (No longer available). The Status Message for E-Commerce Partial Reserved Lines (G52) system control value controls whether to list partially reserved lines as Backordered or Reserved, or to include details (for example, 7 reserved, 3 B/O).

    For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

> **Note:**
>
> If the background jobs are not running and the order ships before the order confirmation email is generated, the status of the shipped order lines is indicated as In stock.

- Expected Date: *odt_expected_ship_date*; included only if the item is backordered or drop ship
- item description: *odt_item_desc*
- SKU description: *odt_SKU_desc*, if any (included only if the item has SKU's)
- custom special handling: *osf_label* and *osf_input*, if any (included only if item is assigned custom special handling) All custom special handling is included, even handling whose Suppress S/H window flag is set to Suppress. The system includes the osf_label even when the osf_input is blank. **Note:** The order confirmation does not include line level special handling charges since these charges are included at the order level.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

- totals:
  - Merchandise: *ost_merch*
  - Shipping and Handling: *ost_freight*, *ost_addl_freight*, *ost_hand*, and *ost_addl_charge*
  - Tax: *ost_tax*
  - Total: *ost_total_amt*

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Purchasing Information:

- Ship To: *ship_to_company*, *ship_to_fname*, *ship_to_minitial*, *ship_to_lname*, *ship_to_addr1*, *ship_to_addr2*, *ship_to_addr3*, *ship_to_addr4*, *ship_to_apt*, *ship_to_city*, *ship_to_state*, *ship_to_postal*, *ship_to_country*
- Sold To: *sold_to_company*, *sold_to_fname*, *sold_to_minitial*, *sold_to_lname*, *sold_to_addr1*, *sold_to_addr2*, *sold_to_addr3*, *sold_to_addr4*, *sold_to_apt*, *sold_to_city*, *sold_to_state*, *sold_to_postal*, *sold_to_country* Customer #: *sold_to_nbr*

Closing: *after_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

> **Note:**
>
> If the Suppress Order Confirmations for Orders in Error (K09) system control value is unselected and there are any errors on the order, the generated email might not be formatted correctly. For example, if there is not sufficient valid information for the shipping address on the order, this name and address are omitted from the generated email.

Shipment Confirmation Email Sample and Contents

See Shipment and Return Confirmation Emails for information on how to generate this email.

Dear Thomas,

The items listed below have been shipped.
You can review your order online at example.com
and follow a link to track your shipment.
If you have any questions, you can call our toll free
number 1-888-555-0185.

Shipment Summary

Order #:	5152 - 1
Order Date:	03/25/2015
Date Shipped:	03/25/2015
Amount Charged:	334.94

Items included in this shipment:

Item/SKU	Quantity
RF1234567890	1
NESTING 8 PIECE STAINLESS STEEL COOKWARE	
RF123SKU4567/ROSE XSML WMNS	1
WOMEN'S ALL WEATHER PACKABLE RAIN JACKET	
WOMEN'S X-SMALL ROSE POCKET RAIN JACKET	

Ship To:	Sold To:
BROWN, THOMAS R	BROWN, THOMAS R
1234 SAMPLE STREET STE 250	1234 SAMPLE STREET STE 250
WESTBOROUGH, MA 01581-3960 US	WESTBOROUGH, MA 01581-3960 US

Regards,
Your friends at Example Retail.
Visit us at example.com!

Contents: The contents of the shipment confirmation email are derived from the *Outbound Email XML Message (CWEmailOut)* as follows:

Preliminary Information:

- greeting: The word Dear followed by the:
- *sold_to_fname*, if any; otherwise,
- *sold_to_company*, if any; otherwise,

  For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

- Valued customer

> **Note:**
>
> Each of the above is in lower case, with just the first letter of the first word capitalized.

- text: *before_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

Shipment Summary:

- Order #: *order_nbr* and *order_ship_to*, separated by a hyphen
- Order Date: *order_date*
- Date Shipped: *ist_ship_date*
- Amount Charged: *ist_ship_total_amt*
- Items included in this shipment:
  - Item/SKU: *idt_item* and *idt_SKU*, if any, separated by a slash; however, this is the *idt_alias_item* if the customer ordered by alias, regardless of the setting of the Display Item Alias (D56) system control value
  - Quantity: *idt_ship_qty*
  - item description: *idt_item_desc*
  - SKU description: *idt_SKU_desc*, if any (included only if the item has SKU's)
- Here are your tracking numbers for the items that shipped:
  - Carrier: *tracking_ship_via_desc*.
  - Tracking Number: *tracking_nbr*, made into a live link to the shipper's web site using the *tracking_URL*.

    Brokered backorder? If the item was a brokered backorder shipped through integration with Order Orchestration, then the ship via description is listed only if Order Orchestration passed a valid ship via code set up in Order Administration; otherwise, the message lists the shipping agent passed from Order Orchestration. In this case, the tracking number is not a live link. Also, if a brokered backorder ships on the same day as a warehouse shipment, the shipment confirmation email includes both the tracking numbers. This occurs regardless of whether you consolidate invoices. See Brokered Backorders for more information.

  For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

> **Note:**
>
> If the order includes two invoices on the same date, one for a brokered backorder with a tracking number, and another shipment without a tracking number, the tracking number from the brokered backorder is indicated for both shipments. A shipment might not have a tracking number if, for example, you confirm a drop shipment or use manual confirmation.

- Ship
  To: *ship_to_company*, *ship_to_fname*, *ship_to_minitial*, *ship_to_lname*, *ship_to_addr1*, *ship_to_addr2*, *ship_to_addr3*, *ship_to_addr4*, *ship_to_apt*, *ship_to_city*, *ship_to_state*, *ship_to_postal*, *ship_to_country*
- Sold
  To: *sold_to_company*, *sold_to_fname*, *sold_to_minitial*, *sold_to_lname*, *sold_to_addr1*, *sold_to_addr2*, *sold_to_addr3*, *sold_to_addr4*, *sold_to_apt*, *sold_to_city*, *sold_to_state*, *sold_to_postal*, *sold_to_country* Customer #: *sold_to_nbr*

Closing: *after_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Return Confirmation Email Sample and Contents

See Shipment and Return Confirmation Emails for more information on how to generate this email.

Dear Thomas,

Your return has successfully been processed. You will receive a credit for the amount of the return shortly. If you have any questions, you can call our toll free number 1-888-555-1085.

Return Summary

Order #:	5152 - 1
Order Date:	03/25/2015
Date Returned:	03/25/2015
Amount Credited:	124.95

Items included in this return:

Item/SKU	Quantity
RF123SKU4567/ROSE XSML WMNS	1
WOMEN'S ALL WEATHER PACKABLE RAIN JACKET	
WOMEN'S X-SMALL ROSE POCKET RAIN JACKET	

Regards,
Your friends at Example Retail.
Visit us at example.com!

Contents: The contents of the return confirmation email are derived from the *Outbound Email XML Message (CWEmailOut)* as follows:

Preliminary Information:

- greeting: The word Dear followed by the:
- *sold_to_fname*, if any; otherwise,
- *sold_to_company*, if any; otherwise,
- Valued customer

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

> **Note:**
>
> Each of the above is in lower case, with just the first letter of the first word capitalized.

- text: *before_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

Return Summary:

- Order #: *order_nbr* and *order_ship_to*, separated by a hyphen
- Order Date: *order_date*
- Date Shipped: *ist_ship_date*
- Amount Charged: *ist_ship_total_amt*
- Items included in this shipment:
  - Item/SKU: *idt_item* and *idt_SKU*, if any, separated by a slash; however, this is the *idt_alias_item* if the customer ordered by alias, regardless of the setting of the Display Item Alias (D56) system control value
  - Quantity: *idt_ship_qty*
  - item description: *idt_item_desc*
  - SKU description: *idt_SKU_desc*, if any (included only if the item has SKU's)
- Here are your tracking numbers for the items that shipped:
  - Carrier: *tracking_ship_via_desc*.
  - Tracking Number: *tracking_nbr*, made into a live link to the shipper's web site using the *tracking_URL*.

    Brokered backorder? If the item was a brokered backorder shipped through integration with Order Orchestration, then the ship via description is listed only if Order Orchestration passed a valid ship via code set up in Order Administration; otherwise, the message lists the shipping agent passed from Order Orchestration. In this case, the tracking number is not a live link. Also, if a brokered backorder ships on the same day as a warehouse shipment, the shipment confirmation email includes both the tracking numbers. This occurs regardless of whether you consolidate invoices. See Brokered Backorders for more information.

  For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

  > **Note:**
  >
  > If the order includes two invoices on the same date, one for a brokered backorder with a tracking number, and another shipment without a tracking number, the tracking number from the brokered backorder is indicated for both shipments. A shipment might not have a tracking number if, for example, you confirm a drop shipment or use manual confirmation.

> **Note:**
>
> If no items were returned: If the order was credited through the application of a negative additional charge rather than processing a return, no item/SKUs are listed. Instead, a message indicates: There were no items associated with this return. A miscellaneous credit was processed on your order. However, the Item/SKU and Quantity headings are still included in the email.

Closing: *after_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

Backorder Notification Email Sample and Contents

You can generate first, second, and continue backorder notifications through the Generate Backorder Notices (GBOC) and Working with Backorders Pending Cancellation (WBPC) menu options. See Other Email Notifications for more information on how to generate these emails.

Dear Thomas,

We regret to inform you that one or more of the items that
you have ordered is on backorder.
You can review your order at example.com to see the next
date we expect to be able to fulfill the backordered item.
If you would like to change your order, please call our toll
free number 1-888-555-1085 and have your order number handy.

Backorder Summary - First Notification

Order #:	5155 - 1
Order Date:	03/25/2015

Item/SKU	Backorder Quantity	Expected Date
BACKORDER	1	03/26/2015
BACKORDER ITEM DESCRIPTIONX		

Purchasing Information

Ship To:	Sold To:	Customer #: 55
BROWN, THOMAS R	BROWN, THOMAS R	
1234 SAMPLE STREET STE 250	1234 SAMPLE STREET STE 250	
WESTBOROUGH, MA 01581-3960 US	WESTBOROUGH, MA 01581-3960 US	

Regards,
Your friends at Example Retail.
Visits us at example.com!

Contents: The contents of the first, second, or continue backorder notification email are derived from the *Outbound Email XML Message (CWEmailOut)* as follows:

Preliminary Information:

- greeting: The word Dear followed by the:
  - *sold_to_fname*, if any; otherwise,

- *sold_to_company*, if any; otherwise,
- Valued customer

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

> **Note:**
>
> Each of the above is in lower case, with just the first letter of the first word capitalized.

- text: *before_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

Notice type:

- Backorder Summary - First Notification
- Backorder Summary - Second Notification
- Backorder Summary - Subsequent Notification

Purchasing Information:

- Order #: *order_nbr* and *order_ship_to*, separated by a hyphen
- Order Date: *order_date*
- for each backordered item:
  - Item/SKU: *bo_item* and *bo_SKU*, if any, separated by a slash

> **Note:**
>
> This email does not specify the item alias even if the customer ordered by alias

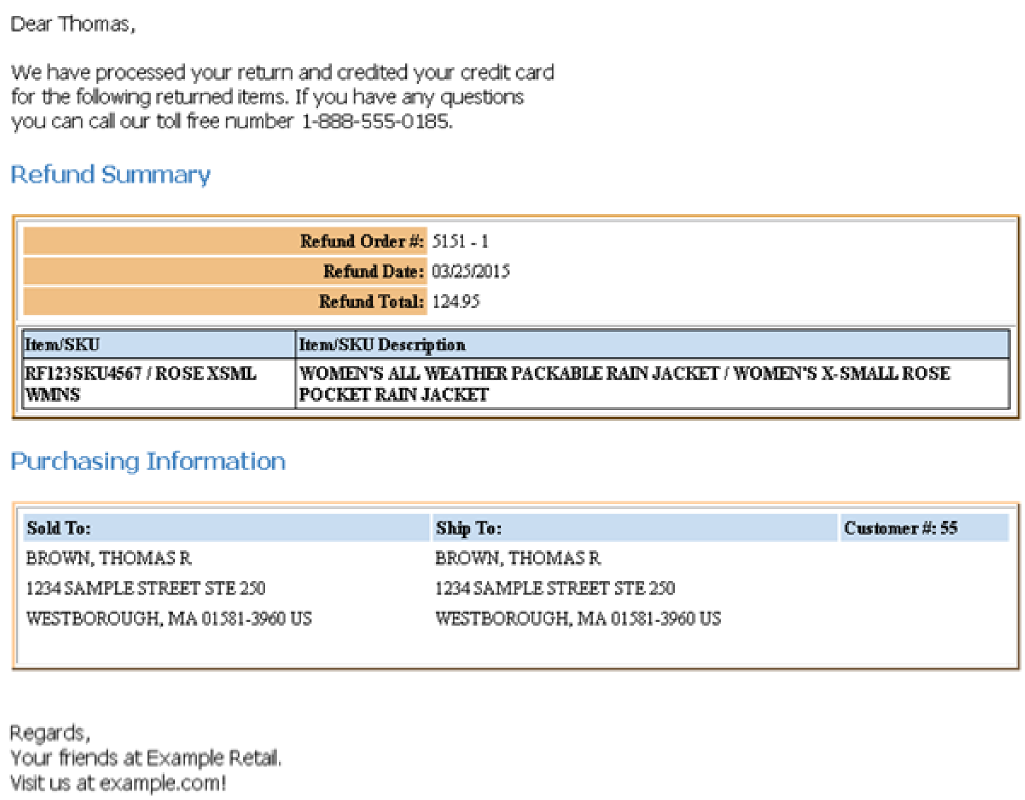
  - Backorder quantity: *bo_qty*
  - Expected date: *bo_expected_date*
  - item description: *bo_item_desc* and SKU description: *bo_SKU_desc*, if any (included only if the item has SKU's)
- Ship
  To: *ship_to_company*, *ship_to_fname*, *ship_to_minitial*, *ship_to_lname*, *ship_to_addr1*, *ship_to_addr2*, *ship_to_addr3*, *ship_to_addr4*, *ship_to_apt*, *ship_to_city*, *ship_to_state*, *ship_to_postal*, *ship_to_country*
- Sold
  To: *sold_to_company*, *sold_to_fname*, *sold_to_minitial*, *sold_to_lname*, *sold_to_addr1*, *sold_to_addr2*, *sold_to_addr3*, *sold_to_addr4*, *sold_to_apt*, *sold_to_city*, *sold_to_state*, *sold_to_postal*, *sold_to_country* Customer #: *sold_to_nbr*

Closing: *after_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Credit Card Credit Acknowledgement Email Sample and Contents

You generate this email through the Processing Refunds (MREF) or Processing Refunds by Order Number (MRFO) menu options. See Other Email Notifications for more information on how to generate this email.



Dear Thomas,

We have processed your return and credited your credit card for the following returned items. If you have any questions you can call our toll free number 1-888-555-0185.

Refund Summary

Refund Order #:	5151 - 1
Refund Date:	03/25/2015
Refund Total:	124.95

Item/SKU	Item/SKU Description
RF123SKU4567 / ROSE XSML WMNS	WOMEN'S ALL WEATHER PACKABLE RAIN JACKET / WOMEN'S X-SMALL ROSE POCKET RAIN JACKET

Purchasing Information

Sold To:	Ship To:	Customer #: 55
BROWN, THOMAS R	BROWN, THOMAS R	
1234 SAMPLE STREET STE 250	1234 SAMPLE STREET STE 250	
WESTBOROUGH, MA 01581-3960 US	WESTBOROUGH, MA 01581-3960 US	

Regards,
Your friends at Example Retail.
Visit us at example.com!

Contents: The contents of the credit card credit acknowledgement email are derived from the *Outbound Email XML Message (CWEmailOut)* as follows:

Preliminary Information:

- greeting: The word Dear followed by the:
  - *sold_to_fname*, if any; otherwise,
  - *sold_to_company*, if any; otherwise,
  - Valued Customer

    For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

    > **Note:**
    >
    > Each of the above is in lower case, with just the first letter of the first word capitalized.

  - text: *before_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

Refund Summary:

- Refund Order #: *order_nbr* and *order_ship_to*, separated by a hyphen
- Refund Date: *ccc_refund_date*
- Refund Total: *ccc_refund_amt*
- Items included in the order:
  - Item/SKU: *ccc_item* and *ccc_SKU* if any, separated by a slash
  - item description: *ccc_item_desc*
  - SKU description: *ccc_SKU_desc* if any (included only if the item has SKU's)

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

> **Note:**
>
> If the credit was generated through a negative additional charge, there are no items listed; however, the headings are still included in the email.

Purchasing Information:

- Sold
  To: *sold_to_company*, *sold_to_fname*, *sold_to_minitial*, *sold_to_lname*, *sold_to_addr1*, *sold_to_addr2*, *sold_to_addr3*, *sold_to_addr4*, *sold_to_apt*, *sold_to_city*, *sold_to_state*, *sold_to_postal*, *sold_to_country* Customer #: *sold_to_nbr*
- Ship
  To: *ship_to_company*, *ship_to_fname*, *ship_to_minitial*, *ship_to_lname*, *ship_to_addr1*, *ship_to_addr2*, *ship_to_addr3*, *ship_to_addr4*, *ship_to_apt*, *ship_to_city*, *ship_to_state*, *ship_to_postal*, *ship_to_country*

Closing: *after_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Soldout Notification Email Sample and Contents

You use the Generating Soldout Notifications (MSON) option to generate these soldout notifications. See Other Email Notifications for more information on how to generate these emails.

Dear Thomas,

We regret to inform you that one or more of the items that you have ordered is no longer available. You can review your order online at example.com or call our toll free number 1-888-555-0185. Please let us know if you would like to order another item in place of the one that is no longer available.

Soldout Summary

Order #:	5157 - 1
Order Date:	03/25/2015

Item/SKU	Soldout Quantity
SOLDOUT	1
SOLDOUT ITEM DESCRIPTION	

Purchasing Information

Ship To:	Sold To:	Customer #: 55
BROWN, THOMAS R	BROWN, THOMAS R	
1234 SAMPLE STREET STE 250	1234 SAMPLE STREET STE 250	
WESTBOROUGH, MA 01581-3960 US	WESTBOROUGH, MA 01581-3960 US	

Regards,
Your friends at Example Retail.
Visits us at example.com!

Contents: The contents of the soldout notification email are derived from the v as follows:

Preliminary Information:

- greeting: The word Dear followed by the:
  - *sold_to_fname*, if any; otherwise,
  - *sold_to_company*, if any; otherwise,
  - Valued customer

    For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

    > **Note:**
    >
    > Each of the above is in lower case, with just the first letter of the first word capitalized.

  - text: *before_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

Notice type: Soldout Summary

- Order #: *order_nbr* and *order_ship_to*, separated by a hyphen
- Order Date: *order_date*
- for each soldout item:

- Item/SKU: *so_item* and *so_SKU*, if any, separated by a slash

> **Note:**
>
> This email does not specify the item alias even if the customer ordered by alias.

- Soldout quantity: *so_qty*
- item description: *so_item_desc* and SKU description: *so_SKU_desc*, if any (included only if the item has SKU's)

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Purchasing Information:

- Ship To: *ship_to_company*, *ship_to_fname*, *ship_to_minitial*, *ship_to_lname*, *ship_to_addr1*, *ship_to_addr2*, *ship_to_addr3*, *ship_to_addr4*, *ship_to_apt*, *ship_to_city*, *ship_to_state*, *ship_to_postal*, *ship_to_country*
- Sold To: *sold_to_company*, *sold_to_fname*, *sold_to_minitial*, *sold_to_lname*, *sold_to_addr1*, *sold_to_addr2*, *sold_to_addr3*, *sold_to_addr4*, *sold_to_apt*, *sold_to_city*, *sold_to_state*, *sold_to_postal*, *sold_to_country* Customer #: *sold_to_nbr*

Closing: *after_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Store Pickup Notification Sample and Contents

See the Store Pickup Confirmation Email Program (L48) for information on how to generate this email.

> **Note:**
>
> Order Orchestration's Store Connect module does not use this notification email; instead, you can use Order Orchestration to generate a notification to the customer.

Dear Thomas,

Your order is ready for pickup at the store listed below.

Order Summary

Order #:	10494 - 1
Order Date:	04/01/2015

Item/SKU	Quantity	Price	Extended Price
PENCIL	1	$0.90	$0.90
BLACK #2 PENCIL			
KABSKU1/BLUE	1	$9.00	$9.00
SMOOTH GEL WRITER			
MIDNIGHT BLUE			

Merchandise:	$9.90
Shipping and Handling:	$5.00
Tax:	$0.50
Total:	$15.40

Pickup Information

Pickup Store:	Sold To:	Customer #: 6
EXAMPLE SHOPS 1234 SAMPLE STREET EXAMPLE MALL NATICK, MA 01701 US	THOMAS BROWN 1234 SAMPLE STREET WESTBOROUGH, MA 01581 US	

Thank you for your business!

Contents: The contents of the store pickup notification email are derived from the *Outbound Email XML Message (CWEmailOut)* as follows:

Preliminary Information:

- greeting: The word Dear followed by the:
  - *sold_to_fname*, if there is a sold-to name; otherwise,
  - Valued customer

    For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

    > **Note:**
    >
    > Each of the above is in lower case, with just the first letter of the first word capitalized.

  - text: *before_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

Order Summary:

- Order #: *order_nbr* and *order_ship_to*, separated by a hyphen
- Order Date: *order_date*
- for each item/SKU ordered:

  - Item/SKU: *odt_item* and *odt_SKU*, if any, separated by a slash; however, this is the *odt_alias_item* if the customer ordered by alias, regardless of the setting of the Display Item Alias (D56) system control value
  - Quantity: *odt_qty*
  - Price: *odt_price*
  - Extended Price: *odt_extended_price*
  - item description: *odt_item_desc*
  - SKU description: *odt_SKU_desc*, if any (included only if the item has SKU's)

  For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

- totals:
  - Merchandise: *ost_merch*
  - Shipping and Handling: *ost_freight*, *ost_addl_freight*, *ost_hand*, and *ost_addl_charge*
  - Tax: *ost_tax*
  - Total: *ost_total_amt*

  For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Pickup Information:

- Ship To: *ship_to_company*, *ship_to_fname*, *ship_to_minitial*, *ship_to_lname*, *ship_to_addr1*, *ship_to_addr2*, *ship_to_addr3*, *ship_to_addr4*, *ship_to_apt*, *ship_to_city*, *ship_to_state*, *ship_to_postal*, *ship_to_country*
- Sold To: *sold_to_company*, *sold_to_fname*, *sold_to_minitial*, *sold_to_lname*, *sold_to_addr1*, *sold_to_addr2*, *sold_to_addr3*, *sold_to_addr4*, *sold_to_apt*, *sold_to_city*, *sold_to_state*, *sold_to_postal*, *sold_to_country* Customer #: *sold_to_nbr*

Closing: *after_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

See Stored Value Card Notification Emails for information on when the system generates these emails.

Stored Value Card Notification Sample and Contents

> **Note:**
>
> Each activated stored value card generates a separate email notification.

Dear Thomas,

This is to notify you of the purchase of a stored value card. PLEASE DO NOT DELETE THIS EMAIL.

Stored Value Card Summary

Order #:	3743 - 1
Order Date:	03/31/2015
Date Activated:	03/31/2015

Item included in this shipment:

Item/SKU	Quantity
GIFTCARDSKU/30.0	1
GIFT CARD SKU'D 30.00 CARD	

You will be receiving a physical card on the item above.

Here is your Stored Value Card number for the item that shipped:

Stored Value Card number	Value
################	$30.00

Dear Tom,
Please enjoy this gift card and have a w onderful
birthday. All our love,
Grandma and Grandpa

Purchasing Information

Gift Card Recipient:	Sold To:	Customer #: 14276
SAMPLE COLLEGE ATTN: BROWN, THOMAS 1234 SAMPLE STREET BUILDING 303 FLR 2 RM 205 WESTBOROUGH, MA 01581	JANE BROWN 1234 SAMPLE STREET SPRINGFIELD, MA 01119	

Thank you for visiting!

Contents: The contents of the stored value card notification email are derived from the *Outbound Email XML Message (CWEmailOut)* as follows:

Preliminary Information:

- greeting: The word Dear followed by the:
  - *ship_to_fname*, if any; otherwise,
  - *ship_to_company*, if any; otherwise,
  - Valued customer

    For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

> **Note:**
>
> Each of the above is in lower case, with just the first letter of the first word capitalized.

- text: *before_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

Notice type: Stored Value Card Summary

- Order #: *order_nbr* and *order_ship_to*, separated by a hyphen
- Order Date: *order_date*
- Date Activated: *svc_activation_date*
- for the stored value card item:
  - Item/SKU: *svc_item* and *svc_SKU*, if any, separated by a slash

    > **Note:**
    >
    > This email does not specify the item alias even if the customer ordered by alias.

- Quantity: *svc_qty*

  > **Note:**
  >
  > The quantity is always 1. A separate notification is generated for each value card number activated.

- item description: *svc_item_desc* and SKU description: *svc_SKU_desc*, if any (included only if the item has SKU's)

Shipment message:

- For a virtual card: You will not be receiving a physical card on the item above.
- For a physical card, early notification: You will be receiving a physical card on the item above.

Here is your Stored Value Card number for the item that shipped:

- Stored Value Card Number: *svc_card_nbr*
- Value: *svc_issue_amount*
- ID Number: *svc_id_nbr* (if your Stored Value Card Email Notification Program (I30) supports it)
- Up to four lines of order message lines flagged to print as gift messages: svc_message1, 2, 3, and 4

Purchasing Information

- Ship To: *ship_to_company*, *ship_to_fname*, *ship_to_minitial*, *ship_to_lname*, *ship_to_addr1*, *ship_to_addr2*, *ship_to_addr3*, *ship_to_addr4*, *ship_to_apt*, *ship_to_city*, *ship_to_state*, *ship_to_postal*, *ship_to_country*
- Sold To: *sold_to_company*, *sold_to_fname*, *sold_to_minitial*, *sold_to_lname*, *sold_to_addr1*, *so*

ld_to_addr2, *sold_to_addr3*, *sold_to_addr4*, *sold_to_apt*, *sold_to_city*, *sold_to_state*, *sold_to_postal*, *sold_to_country* Customer #: *sold_to_nbr*

Closing: *after_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

“Contact Us” Notification Sample and Contents

You can generate this email by selecting Send Contact Us Email at the Display More Options Screen in order entry, maintenance, and inquiry. See Summary of Customer Correspondence for information on how to generate these emails.

Dear Thomas,

Please contact us to help us resolve a question on your order. You can call us at 1-800-555-0185 or email us at support@example.com. We look forward to hearing from you.

Purchasing Information

Order #:	5155 - 1
Order Date:	03/25/2015

Sold To:	**Ship To:**	**Customer #: 55**
BROWN, THOMAS R	BROWN, THOMAS R	
1234 SAMPLE STREET STE 250	1234 SAMPLE STREET STE 250	
WESTBOROUGH, MA 01581-3960 US	WESTBOROUGH, MA 01581-3960 US	

Regards,
Your friends at Example Retail.
Visit us at example.com!

Contents: The contents of the “contact us” email are derived from the *Outbound Email XML Message (CWEmailOut)* as follows:

Preliminary Information:

- greeting: The word Dear followed by the:
  - *sold_to_fname*,, if any; otherwise,
  - *sold_to_company*, if any; otherwise,
  - Valued customer

    For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

    > **Note:**
    >
    > Each of the above is in lower case, with just the first letter of the first word capitalized.

  - text: *before_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

Purchasing Information:

- Order #: *order_nbr* and *order_ship_to*, separated by a hyphen
- Order Date: *order_date*
- Sold To: *sold_to_company*, *sold_to_fname*, *sold_to_minitial*, *sold_to_lname*, *sold_to_addr1*, *sold_to_addr2*, *sold_to_addr3*, *sold_to_addr4*, *sold_to_apt*, *sold_to_city*, *sold_to_state*, *sold_to_postal*, *sold_to_country* Customer #: *sold_to_nbr*
- Ship To: *ship_to_company*, *ship_to_fname*, *ship_to_minitial*, *ship_to_lname*, *ship_to_addr1*, *ship_to_addr2*, *ship_to_addr3*, *ship_to_addr4*, *ship_to_apt*, *ship_to_city*, *ship_to_state*, *ship_to_postal*, *ship_to_country*

Closing: *after_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Credit Card Decline Notification Sample and Contents

The pick slip generation program generates these emails to customers when their orders have been placed on hold due to a declined authorization. Also, the REAUTH periodic function generates them; see REAUTH Processing for background. See Summary of Customer Correspondence for more information.

Dear Thomas,

Please contact us to resolve an issue with your order
so that we can fulfill it as soon as possible. You can call
us at 1-800-555-0185 or email us at billing@example.com.
We look forward to hearing from you.

Purchasing Information

Order #:	5159 - 1
Order Date:	03/27/2015

Sold To:	**Customer #: 55**
BROWN, THOMAS R	
1234 SAMPLE STREET STE 250	
WESTBOROUGH, MA 01581-3960 US	

Regards,
Your friends at Example Retail.
Visit us at example.com!

Contents: The contents of the credit card decline email are derived from the *Outbound Email XML Message (CWEmailOut)* as follows:

Preliminary Information:

- greeting: The word Dear followed by the:
  - *sold_to_fname*,, if any; otherwise,

- *sold_to_company*, if any; otherwise,
- Valued customer

  For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

> **Note:**
>
> Each of the above is in lower case, with just the first letter of the first word capitalized.

- text: *before_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

Purchasing Information:

- Order #: *order_nbr* and *order_ship_to*, separated by a hyphen
- Order Date: *order_date*
- Sold To: *sold_to_company*, *sold_to_fname*, *sold_to_minitial*, *sold_to_lname*, *sold_to_addr1*, *sold_to_addr2*, *sold_to_addr3*, *sold_to_addr4*, *sold_to_apt*, *sold_to_city*, *sold_to_state*, *sold_to_postal*, *sold_to_country* Customer #: *sold_to_nbr*

Closing: *after_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Quote Confirmation Email Sample and Contents

See Quote Confirmation Emails for a discussion on how to generate this email.

Dear Thomas,

Thank you for requesting a quote from Example Retail.
The quote summary below provides you with the estimated order totals should you wish to place an order for the items you have requested.
To place an order for the quote below, log in to our web site and select the Place Order option next to the quote on your customer order page. Or, call us at 1-800-555-0185 and provide our customer service representative with your pre-order quote number.
Thank you for choosing Example Retail.

Quote Summary

Quote #:	5133 - 1
Quote Date:	03/11/2015
Quote Expire Date:	04/10/2015
Sale Rep:	MARY JOHNSON

Item/SKU	Quantity	Price	Extended Price	Country of Orig.	Harmonize Code
RF1234567890	1	$199.99	$199.99	US	8474646464444432
NESTING 8 PIECE STAINLESS STEEL COOKWARE					
RF123SKU4567/ROSE XSML WMNS	1	$119.00	$119.00	US	HARMONIZE
WOMEN'S ALL WEATHER PACKABLE RAIN JACKET					
WOMEN'S X-SMALL ROSE POCKET RAIN JACKET					
SPECIAL	1	$19.99	$19.99	US	1
STANDARD SPECIAL HANDLING ITEM DESCRIP					
CUSTOM	1	$30.00	$30.00		
CUSTOM SPECIAL HANDLING ITEM DESCRIPTION					

Merchandise:	$368.98
Shipping and Handling:	$3.00
Tax:	$18.45
Total:	$390.43

Purchasing Information

Ship To:	Sold To:	Customer #: 55
SMITH, JOHN M	BROWN, THOMAS R	
1234 SAMPLE STREET STE 101	1234 SAMPLE STREET	
TEMPLETON, MA 01468 US	WESTBOROUGH, MA 01581-3960 US	

Regards,
Your friends at Example Retail.
Visit us at example.com!

Contents: The contents of the quote confirmation email are derived from the *Outbound Email XML Message (CWEmailOut)* as follows:

Preliminary Information:

- greeting: The word Dear followed by the:
- *sold_to_fname*,, if any; otherwise,
- *sold_to_company*, if any; otherwise,
- Valued customer

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

> **Note:**
>
> Each of the above is in lower case, with just the first letter of the first word capitalized.

- text: *before_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.
-
-

Quote Summary:

- Quote #: *order_nbr* and *order_ship_to*, separated by a hyphen
- Quote Date: *order_date*
- Quote Expire Date: *cancel_date*
- Sale Rep: *sales_rep_name*
- for each item/SKU ordered:
  – Item/SKU: *odt_item* and *odt_SKU*, if any, separated by a slash; however, this is the *odt_alias_item* if the customer ordered by alias, regardless of the setting of the Display Item Alias (D56) system control value
  – Quantity: *odt_qty*
  – Price: *odt_price*
  – Extended Price: *odt_extended_price*
  – Country of Orig.: *sku_country_of_origin*
  – Harmonize Code: *harmonize_code*
  – item description: *odt_item_desc*
  – SKU description: *odt_SKU_desc*, if any (included only if the item has SKU's)

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Soldout items: oldout items are included on the Quote Confirmation regardless of the Exclude S/O on order confirmation setting for the order type on the quote.

- totals:
  – Merchandise: *ost_merch*
  – Shipping and Handling: *ost_freight*, *ost_addl_freight*, *ost_hand*, and *ost_addl_charge*
  – Tax: *ost_tax*
  – Total: *ost_total_amt*

Gift quotes: If you enter a gift quote (the Gift flag on the Work with Order screen is selected), the system still prints pricing information on the Quote Form and Quote Confirmation.

Purchasing Information:

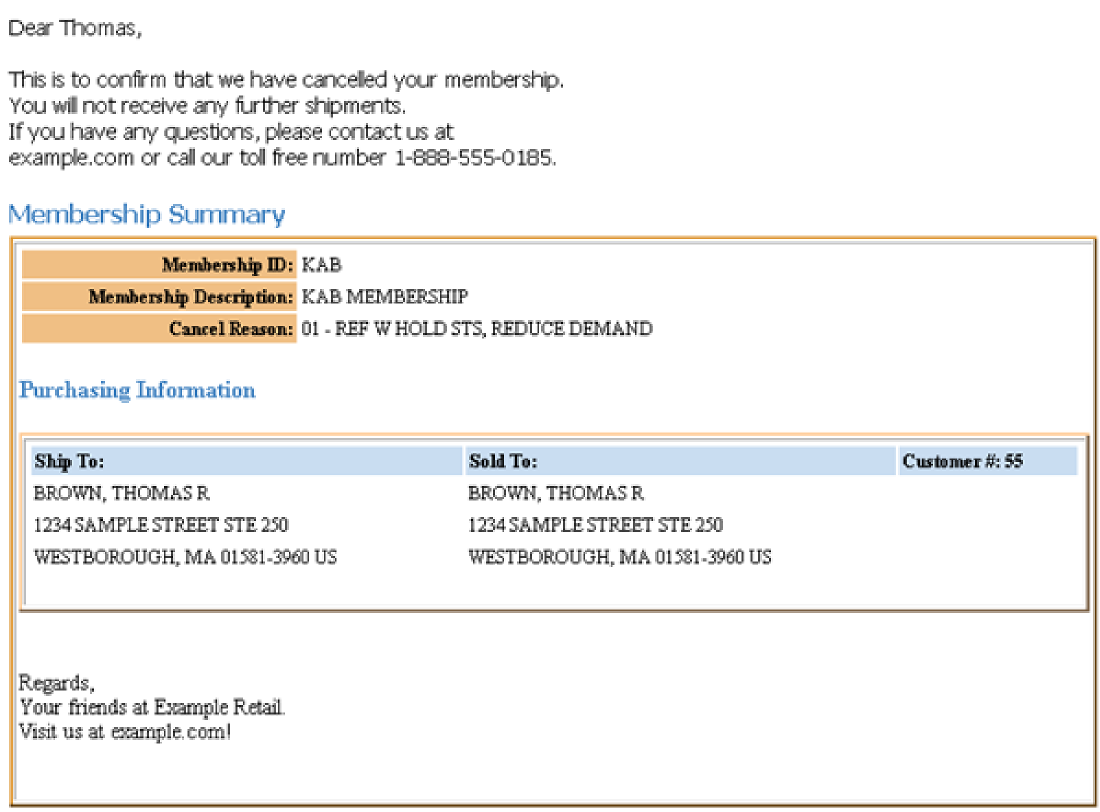
- Ship To: *ship_to_company*, *ship_to_fname*, *ship_to_minitial*, *ship_to_lname*, *ship_to_addr1*, *ship_to_addr2*, *ship_to_addr3*, *ship_to_addr4*, *ship_to_apt*, *ship_to_city*, *ship_to_state*, *ship_to_postal*, *ship_to_country*
- Sold To: *sold_to_company*, *sold_to_fname*, *sold_to_minitial*, *sold_to_lname*, *sold_to_addr1*, *sold_to_addr2*, *sold_to_addr3*, *sold_to_addr4*, *sold_to_apt*, *sold_to_city*, *sold_to_state*, *sold_to_postal*, *sold_to_country* Customer #: *sold_to_nbr*

Closing: *after_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Membership Cancellation Notification Sample and Contents

See Membership Cancellations for information on how to generate this email.



Dear Thomas,

This is to confirm that we have cancelled your membership.
You will not receive any further shipments.
If you have any questions, please contact us at
example.com or call our toll free number 1-888-555-0185.

Membership Summary

Membership ID:	KAB
Membership Description:	KAB MEMBERSHIP
Cancel Reason:	01 - REF W HOLD STS, REDUCE DEMAND

Purchasing Information

Ship To:	**Sold To:**	**Customer #: 55**
BROWN, THOMAS R	BROWN, THOMAS R	
1234 SAMPLE STREET STE 250	1234 SAMPLE STREET STE 250	
WESTBOROUGH, MA 01581-3960 US	WESTBOROUGH, MA 01581-3960 US	

Regards,
Your friends at Example Retail.
Visit us at example.com!

Contents: The contents of the membership cancellation confirmation email are derived from the *Outbound Email XML Message (CWEmailOut)* as follows:

Preliminary Information:

- greeting: The word Dear followed by the:
  - *sold_to_fname*,, if the email is sent to the sold-to customer and there is a sold-to name; otherwise,

- *ship_to_fname*, if the email is sent to the ship-to customer and there is a ship-to name; otherwise,
- Valued customer

  For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

> **Note:**
>
> Each of the above is in lower case, with just the first letter of the first word capitalized.

- text: *before_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

Membership Summary:

- Membership ID: *membership_id*
- Membership description: *membership_desc*
- Cancel reason: *mbr_cancel_rsn* and *mbr_cancel_rsn_desc*, separated by a space and hyphen

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Purchasing Information:

- Ship To: *ship_to_company*, *ship_to_fname*, *ship_to_minitial*, *ship_to_lname*, *ship_to_addr1*, *ship_to_addr2*, *ship_to_addr3*, *ship_to_addr4*, *ship_to_apt*, *ship_to_city*, *ship_to_state*, *ship_to_postal*, *ship_to_country*
- Sold To: *sold_to_company*, *sold_to_fname*, *sold_to_minitial*, *sold_to_lname*, *sold_to_addr1*, *sold_to_addr2*, *sold_to_addr3*, *sold_to_addr4*, *sold_to_apt*, *sold_to_city*, *sold_to_state*, *sold_to_postal*, *sold_to_country* Customer #: *sold_to_nbr*

Closing: *after_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Cancellation Request Failure Email Sample and Contents

See the Order Maintenance Confirmation E-Mail Program (H12) system control value on how to generate this email.

Dear Thomas,

A maintenance failure has occurred.

Order Information

Order #:	9 - 1
Order Date:	10/06/2015

Sold To:	**Customer #: 101**
BROWN, THOMAS R	
1234 SAMPLE STREET STE202	
ADDRESS LINE 2	
ADDRESS LINE 3	
ADDRESS LINE 4	
WESTBOROUGH, MA 01581 US	

Thank you for your service.

Contents: The contents of the cancellation request failure email are derived from the *Outbound Email XML Message (CWEmailOut)* as follows:

Preliminary Information:

- greeting: The word Dear followed by the:
  - v, if there is a sold-to name; otherwise,
  - Valued customer

    For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

    > **Note:**
    >
    > Each of the above is in lower case, with just the first letter of the first word capitalized.

- text: *before_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

Order Information Summary:

- Order #: *order_nbr* and *order_ship_to*, separated by a hyphen
- Order Date: *order_date*

Sold To Information:

- Sold To: *sold_to_company*, *sold_to_fname*, *sold_to_minitial*, *sold_to_lname*, *sold_to_addr1*, *sold_to_addr2*, *sold_to_addr3*, *sold_to_addr4*, *sold_to_apt*, *sold_to_city*, *sold_to_state*, *sold_to_postal*, *sold_to_country* Customer #: *sold_to_nbr*
- Ship To: *ship_to_company*, *ship_to_fname*, *ship_to_minitial*, *ship_to_lname*, *ship_to_addr1*, *sh*

ip_to_addr2, *ship_to_addr3*, *ship_to_addr4*, *ship_to_apt*, *ship_to_city*, *ship_to_state*, *ship_to_postal*, *ship_to_country*

Closing: *after_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Order Cancellation Confirmation Email Sample and Contents

See the Order Cancellation Email Program (K78)) system control value for information on how to generate this email.

Dear Thomas,

This is to confirm that we have cancelled your order.
If you have any questions, please contact us at
example.com or call our toll free number 1-888-555-0185.

Order Cancellation Summary

Order #:	5163 - 1
Order Date:	03/27/2015

Item/SKU	Quantity
ITEM	1
ITEM DESCRIPTION	

Purchasing Information

Ship To:	Sold To:	Customer #: 55
BROWN, THOMAS R	BROWN, THOMAS R	
1234 SAMPLE STREET STE 250	1234 SAMPLE STREET STE 250	
WESTBOROUGH, MA 01581-3960 US	WESTBOROUGH, MA 01581-3960 US	

Regards,
Your friends at Examle Retail.
Visit us at example.com!

Contents: The contents of the order cancellation confirmation email are derived from the *Outbound Email XML Message (CWEmailOut)* as follows:

Preliminary Information:

- greeting: The word Dear followed by the:
  - v, if there is a sold-to name; otherwise,
  - Valued customer

  For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

> **Note:**
>
> Each of the above is in lower case, with just the first letter of the first word capitalized.

- text: *before_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

Order Cancellation Summary:

- Order #: *order_nbr* and *order_ship_to*, separated by a hyphen
- Order Date: *order_date*

  For each open or held order line from the order when you canceled it:

  - Item/SKU: *odt_item* and *odt_SKU*, if any, separated by a slash; however, this is the *odt_alias_item* if the customer ordered by alias, regardless of the setting of the Display Item Alias (D56) system control value
  - Quantity: *odt_qty_cancelled*. If there have been previous cancellations against the order line, this is the quantity canceled during the session that canceled the order.
  - item description: *odt_item_desc*
  - SKU description: *odt_SKU_desc*, if any (included only if the item has SKU's)

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

> **Note:**
>
> Order lines that were previously canceled or sold out are not listed; also, any order lines canceled using the Cancel Reason Code to Suppress Email (L08) are omitted.

Purchasing Information:

- Ship
  To: *ship_to_company*, *ship_to_fname*, *ship_to_minitial*, *ship_to_lname*, *ship_to_addr1*, *ship_to_addr2*, *ship_to_addr3*, *ship_to_addr4*, *ship_to_apt*, *ship_to_city*, *ship_to_state*, *ship_to_postal*, *ship_to_country*
- Sold
  To: *sold_to_company*, *sold_to_fname*, *sold_to_minitial*, *sold_to_lname*, *sold_to_addr1*, *sold_to_addr2*, *sold_to_addr3*, *sold_to_addr4*, *sold_to_apt*, *sold_to_city*, *sold_to_state*, *sold_to_postal*, *sold_to_country* Customer #: *sold_to_nbr*

Closing: *after_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Order Line Cancellation Confirmation Email Sample and Contents

See the Order Line Cancellation Email Program (K79) system control value for information on how to generate this email.

Dear Thomas,

This is to confirm that we have cancelled the items listed below at your request. If you have any questions, please contact us at example.com or call our toll free number 1-888-555-0185.

Order Line Cancellation Summary

Order #:	5149 - 1
Order Date:	03/25/2015

Item/SKU	Quantity
RF123SKU4567/ROSE XSML WMNS	1
WOMEN'S ALL WEATHER PACKABLE RAIN JACKET	
WOMEN'S X-SMALL ROSE POCKET RAIN JACKET	

Remaining Unshipped or Open Items

Item/SKU	Quantity	Status	Expected Date
RF1234567890	1	In stock	
NESTING 8 PIECE STAINLESS STEEL COOKWARE			

Purchasing Information

Ship To:	Sold To:	Customer #: 55
BROWN, THOMAS R	BROWN, THOMAS R	
1234 SAMPLE STREET STE 250	1234 SAMPLE STREET STE 250	
WESTBOROUGH, MA 01581-3960 US	WESTBOROUGH, MA 01581-3960 US	

Regards,
Your friends at Example Retail.
Visit us at example.com!

Contents: The contents of the order line cancellation confirmation email are derived from the *Outbound Email XML Message (CWEmailOut)* as follows:

Preliminary Information:

- greeting: The word Dear followed by the:
  - *sold_to_fname*,, if there is a sold-to name; otherwise,
  - Valued customer

  For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

  > **Note:**
  >
  > Each of the above is in lower case, with just the first letter of the first word capitalized.

- text: *before_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

Order Line Cancellation Summary:

- Order #: *order_nbr* and *order_ship_to*, separated by a hyphen

- Order Date: *order_date*
- For each order line canceled during the order maintenance session or other activity, such as Working with Backorders Pending Cancellation (WBPC):
  - Item/SKU: *odt_item* and *odt_SKU*, if any, separated by a slash; however, this is the *odt_alias_item* if the customer ordered by alias, regardless of the setting of the Display Item Alias (D56) system control value
  - Quantity: *odt_qty_cancelled*, the total quantity canceled at this time, even if multiple cancel reason codes were used in order maintenance. Does not include any previous quantity canceled.
  - item description: *odt_item_desc*
  - SKU description: *odt_SKU_desc*, if any (included only if the item has SKU's)

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

> **Note:**
>
> Order lines that were previously canceled or sold out are not listed; also, any order lines canceled using the Cancel Reason Code to Suppress Email (L08) are omitted.

- Remaining Unshipped or Open Items:
- For each remaining open or held order line:
  - Item/SKU: *odt_item* and *odt_SKU*, if any, separated by a slash; however, this is the *odt_alias_item* if the customer ordered by alias, regardless of the setting of the Display Item Alias (D56) system control value
  - Quantity: *odt_qty*, the open or held quantity remaining on the order line
  - Status: *odt_availability_msg*; indicates whether the item is In stock Backordered (including order lines that are not reserved because they have future arrival dates); being fulfilled through the Order Orchestration Integration (Store Ship); drop ship (includes an Exp Date); or sold out (No longer available). The Status Message for E-Commerce Partial Reserved Lines (G52) system control value controls whether to list partially reserved lines as Backordered or Reserved, or to include details (for example, 7 reserved, 3 B/O).
  - Expected Date: *odt_expected_ship_date*; included only if the item is backordered or drop ship
  - item description: *odt_item_desc*
  - SKU description: *odt_SKU_desc*, if any (included only if the item has SKU's)

Purchasing Information:

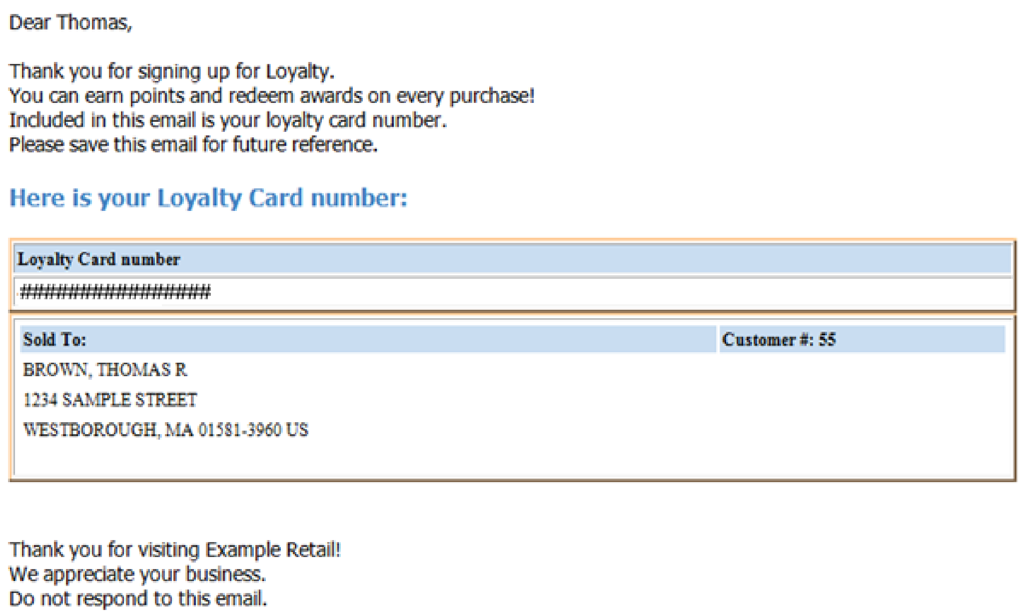
- Ship To: *ship_to_company*, *ship_to_fname*, *ship_to_minitial*, *ship_to_lname*, *ship_to_addr1*, *ship_to_addr2*, *ship_to_addr3*, *ship_to_addr4*, *ship_to_apt*, *ship_to_city*, *ship_to_state*, *ship_to_postal*, *ship_to_country*
- Sold To: *sold_to_company*, *sold_to_fname*, *sold_to_minitial*, *sold_to_lname*, *sold_to_addr1*, *so*

ld_to_addr2, *sold_to_addr3*, *sold_to_addr4*, *sold_to_apt*, *sold_to_city*, *sold_to_state*, *sold_to_postal*, *sold_to_country* Customer #: *sold_to_nbr*

Closing: *after_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Oracle Retail Customer Engagement Loyalty Registration Notification Sample and Contents



Dear Thomas,

Thank you for signing up for Loyalty.
You can earn points and redeem awards on every purchase!
Included in this email is your loyalty card number.
Please save this email for future reference.

Here is your Loyalty Card number:

Loyalty Card number
##################

Sold To:	Customer #: 55
BROWN, THOMAS R	
1234 SAMPLE STREET	
WESTBOROUGH, MA 01581-3960 US	

Thank you for visiting Example Retail!
We appreciate your business.
Do not respond to this email.

See the ORCE Loyalty Registration Notification Email Program (M10) for information on how to generate this email.

Contents: The contents of the Oracle Retail Customer Engagement loyalty registration notification email are derived from the *Outbound Email XML Message (CWEmailOut)* as follows:

Preliminary Information:

- greeting: The word Dear followed by the:
  - *sold_to_fname*, if there is a sold-to name; otherwise,
  - *sold_to_company* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

    > **Note:**
    >
    > Each of the above is in lower case, with just the first letter of the first word capitalized.

- text: *before_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

- Here is your Loyalty Card number: the loyalty card number generated and signed to the customer from Oracle Retail Customer Engagement.
- Sold
  To: *sold_to_company*, *sold_to_fname*, *sold_to_minitial*, *sold_to_lname*, *sold_to_addr1*, *sold_to_addr2*, *sold_to_addr3*, *sold_to_addr4*, *sold_to_apt*, *sold_to_city*, *sold_to_state*, *sold_to_postal*, *sold_to_country* Customer #: *sold_to_nbr*

Closing: *after_line_msg*. The email includes a line break (
) between each line entered at the Change E-Mail Template Screen.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Simple Format Notification Sample

The loyalty activation/deactivation and purchase order use a simple email format such as the following.

From: customer_servoce@example.com

Sent: Friday, February 2, 2009 4:22 p.m.

To: ebrown@example.com

Subject: PREFERRED Activation

We are pleased to tell you that your recent order qualifies you for membership in our Preferred Members Club. Club members receive a 5% discount on all orders and free ground shipping.

GUESTVIP12 000000038

Sold To: JONES, MICHAEL Customer #: 13082

PREFERRED MEMBERS CLUB   PREFERRED

Welcome to the club! We appreciate your business.

Work with E-Mail Template Screen

Purpose: Use this screen to enter boilerplate company-wide text to include in email notifications.

Overrides? You can also enter override text templates at the entity level, or overrides for certain notification types at the order type level and the entity/order type level. See Email Text Templates for more information.

How to display this screen: Enter WEMT in the Fast path field at the top of any menu, or select Work with E-Mail Templates from a menu.

Field	Description
Notice type	Indicates the type of email notification. Available templates are: • Backorder 1st notice (template type B1) • Backorder 2nd notice (template type B2) • Backorder continue notice (template type B3) • C/C credit acknowledgment (template type C1) • Contact us (template type CU) • Credit Card Decline (template type (CX) • Loyalty Activate Notice (template LA) • Loyalty Deactivate Notice (template LD) • Oracle Retail Customer Engagement Loyalty Registration Notice (template LR) • Maintenance Failure (template type ME) **Note:** The system generates maintenance failure notices in response to unsuccessful cancellation requests from the web storefront. • Membership Cancel Confirmation (template type MF) • Order Cancellation (template type OB) • Order Confirmation (template type OC) • Order Line Cancellation Confirmation (template type OL) • Purchase Order (template type PO) • Quote Confirmation (template type QC) • Return Confirmation (template type RC) • Soldout notification (template type S1) • Shipment Confirmation (template type SC) • Store Pickup Confirmation (template type SP) • Stored Value Card notification (template type SV) Alphanumeric, 25 positions; display-only.

Screen Option	Procedure
Enter or change the contents of an email notification template	Select Change for a template to advance to the Change E-Mail Template Screen.
Display the contents of an email notification template	Select Display for a template to advance to the Display E-Mail Template Screen. You cannot change any information at this screen. See the Change E-Mail Template Screen for field descriptions.

Change E-Mail Template Screen

Purpose: Use this screen to specify the standard text to include in one of the types of email notifications available in Order Administration at the company level.

Overrides? You can also enter override text templates at the entity level, and override certain notification types at the order type level and the entity/order type level. See Email Text Templates for more information.

How to display this screen: Select Change for a notice type at the Work with E-Mail Template Screen.

Field	Description
XML only	Indicates whether to generate the *Outbound Email XML Message (CWEmailOut)*) rather than an actual email notification. This XML message includes additional information that is not included in the standard email notice. You might choose to generate the XML message so that you can use the information to produce a reformatted HTML email that includes promotional material. See *Outbound Email XML Message (CWEmailOut)*) for an overview. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Valid values are: Selected = Generate the *Outbound Email XML Message (CWEmailOut)*) rather than an actual email Unselected = Generate the email notification. See HTML Format Notification Samples and Contents for more information. **Note:** • This option is not available for the loyalty activation/deactivation or purchase order templates. • This setting applies if the system uses the associated text template. See HTML Email or Outbound Email XML Message? for more information.
Text to print above items	The standard text to include in each email above the information specific to the order, if the email is order-related. See the HTML Format Notification Samples and Contents and the Simple Format Notification Sample. Alphanumeric, ten 60-position lines; at least one line required.
Text to print below items	The standard text to include in each email below the information specific to the order, if the email is order-related. See the HTML Format Notification Samples and Contents and the Simple Format Notification Sample. **Note:** Not typically included for the purchase order email, since the email does not include any details. Alphanumeric, three 60-position lines; optional.

Completing this screen: Enter the text to appear in the email notification or to include in the *Outbound Email XML Message (CWEmailOut)*). You can type over existing text to change it, or delete it to clear a line. The text you enter will be included the next time you generate this type of email notification. Any lines that you leave blank will be omitted from the email.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Testing Email Generation (UEML)

Purpose: Use this option to generate a test email in order to confirm that Order Administration is correctly configured to generate emails.

This option does not support testing individual message notification types.

Send Email Message Screen

How to display this screen: Enter UEML in the Fast path field at the top of any menu or select Test Email from a menu.

Field	Description
To	The email address to receive the test email. **Note:** The system does not confirm that you enter a valid email address. Alphanumeric, 50 positions; required.
Subject	The text to use as the subject line for the test email. Alphanumeric, 44 positions; required.
Message	Up to four lines of text to include in the body of the email. Alphanumeric, 64 positions each; at least one line required.

Completing this screen: Complete the three fields and click OK to generate a test email.

Troubleshooting: See Emails Troubleshooting for some steps you can take to identify whether the Order Administration application is configured correctly to generate emails.

Sending Internet Order Ship Confirmation (ESCF)

Purpose: Use the Send Internet Order Ship Confirmation menu option to generate email notifications or the *Outbound Email XML Message (CWEmailOut)*) to customers when an order shipment or return takes place. The confirmation is sent to the order-level email address on the order; see Working with an Order-Level Email Address.

Confirmations for all orders? See Shipment and Return Confirmation Emails for a discussion of which orders are eligible to generate these email confirmations based on the settings in your company and the customer’s email information.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Generate shipment confirmation during billing? If the Send Shipment Confirmation from Billing (L98) system control value is selected, the system generates shipment and return confirmations during billing. You can still use this menu option to generate an additional shipment or return confirmation. See this system control value for more information.

> **Note:**
>
> If you use the Narvar Integration, Narvar generates shipment confirmation emails to the customer based on an order request message sent through billing, and the shipment confirmation is not generated through the process described here.

Periodic function: You can also use the periodic function ECSHCNF (program name = ECR0154) to generate shipment and return confirmation emails or messages. See E-Commerce Setup.

About the outbound email XML message: See *Outbound Email API* for an overview.

For sample emails and more information: See Shipment Confirmation Email Sample and Contents and Return Confirmation Email Sample and Contents.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Interrupting or completing email generation: If you generate emails for a single day, the system keeps track of the last email generated so that you do not send the same email more than once; however, this option is not supported if you consolidate invoices. See Stopping and Restarting Shipment and Return Confirmation Emails for more information.

Save in email repository? The Write Outbound Email to Email Repository (H99) system control value controls whether the email notification or the *Outbound Email XML Message (CWEmailOut)* is stored in correspondence history. See this system control value for more information on identifying and reviewing outbound emails for a customer.

Order history message: When a shipment or return confirmation email or *Outbound Email XML Message (CWEmailOut)*) is sent, Order Administration creates an order history message such as Retrn Conf to acustomer@example.com. You can review order history messages at the Display Order History Screen.

No emails generated? If the Shipment Confirmation Program (G51) system control value is blank, or if you are generating an actual email (rather than the *Outbound Email XML Message (CWEmailOut)*) and the system control value is not set to ShpConf, no shipment confirmation emails are generated. Similarly, if the Return Confirmation E-Mail Program (H53) system control value is blank, or if you are generating an actual email (rather than the *Outbound Email XML Message (CWEmailOut)*) and the system control value is not set to RetConf, no return confirmation emails are generated.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Send Internet Shipment Confirmations Screen

How to display this screen: Enter ESCF in the Fast path field at the top of any menu, or select Send Internet Order Ship Confirmation from a menu.

Field	Description
From...	The first shipment date to include when generating shipment confirmations. All eligible orders with shipments on or after this date, and not later than the To date, are included for shipment confirmation. The current date defaults. Numeric, 6 positions (in user date format); required.
To...	The last shipment date to include when generating shipment confirmations. All eligible orders with shipments on or before this date, and not before the From date, are included for shipment confirmation. The current date defaults. Numeric, 6 positions (in user date format); required.

Instructions: To generate shipment confirmation emails and return confirmation emails or the *Outbound Email XML Message (CWEmailOut)*), override the From and To dates if necessary. Select Accept to generate the confirmation emails for the selected date(s).

For more information see the Web Services Guide on My Oracle Support (ID 2953017.1).

Stopping and Restarting Shipment and Return Confirmation Emails

Overview: When you generate shipment and return confirmation emails through the Send Internet Shipment Confirmations Screen or through the ECSHCNF periodic function, the system can keep track of the last email generated based on invoice number, enabling you to:

- generate confirmation emails throughout the day for new shipments
- continue email generation if you need to interrupt the process for any reason

Supported when? Stopping and restarting shipment and return confirmations is supported only if:

- the Consolidated Invoice (B49) system control value is not selected
- you do not enter a range of dates at the Send Internet Shipment Confirmations Screen. To be able to restart generation where you left off, you must make sure that the To...and From...dates are the same.

Otherwise, you do not have the option to restart the email generation process without generating duplicate emails.

How to stop email generation: To interrupt the generation of shipment and return confirmation emails, use the Purge Active Procedures Across Users (MACX) option to delete the active procedure with a Type of SC and a Program of ECR0154. After you delete the active procedure, the generation process might generate approximately 25 more confirmations before it stops.

Restarting email generation: To restart email generation where it left off for the date, simply run the periodic function or use the Send Internet Shipment Confirmations Screen to generate confirmations for the same date. Using the periodic function generates email confirmations for the current date, while the Send Internet Shipment Confirmations Screen enables you to specify a single date for email generation.

How does the system keep track? When you generate shipment and return email confirmations, the system writes a record in the Report Generic table noting the date and the last invoice number with a confirmation email generated. If you generate email confirmations again for that same date, the process starts with the next invoice number. Similar to the Active Procedure record, the Report Generic record has a Report type of SC. If for any reason you ever need to regenerate a group of confirmation emails again, you can use SQL to reset the last invoice number in that table before you restart the email generation process.

Workflow Management

Topics in this part: The following topics describe the functions available for workflow management.

- Workflow Management Overview and Setup provides an overview on workflow management and required setup.

- Working with Tickler User Groups (WTUG) explains how to create and work with tickler user groups.
- Working with Tickler Category (WTCT) explains how to create and work with tickler categories.
- Working with Tickler Resolution Reasons (WTRR) explains how to create and work with tickler resolution reasons.
- Working with Tickler Events (WTEV) explains how to define tickler event settings at the event level and event rule level and create, change, delete, and define procedures for event rules.
- Working with Tickler Users/User Groups (WTIC) allows workflow users to review and work with ticklers in the user's or user group's tickler work queue.
- Workflow Management (WWFM) allows workflow supervisors to review and work with ticklers in a tickler work queue.
- Purging Ticklers (MPTK) allows you to purge resolved ticklers by date range.

Working with Tickler User Groups (WTUG)

Purpose: Use this menu option to create, change, or display a tickler user group.

Tickler groups are groups of users that work with and resolve ticklers. You can assign users to a tickler user group on the Work with User Tickler Group Screen.

The Type field for the tickler group defines whether the users in the group are:

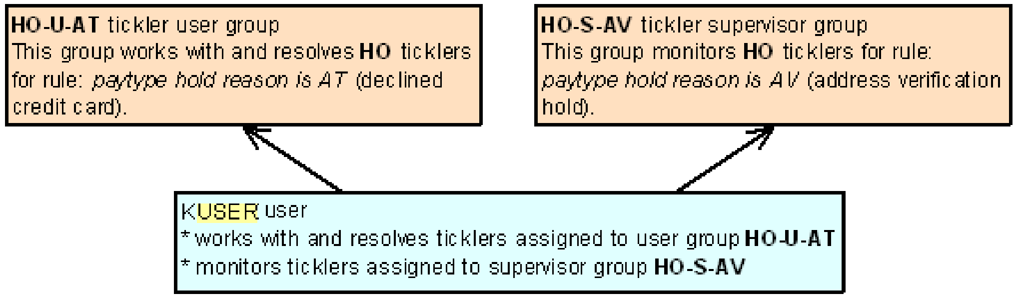
- tickler users (tickler group type U), indicating they work with ticklers assigned to their tickler user group using the Working with Tickler Users/User Groups (WTIC) menu option. Tickler users can work with ticklers assigned to them or their user group, but do not have access to any other ticklers.
- tickler supervisors (tickler group type S), indicating they monitor the ticklers assigned to their tickler user group using the Workflow Management (WWFM) menu option. Tickler supervisors can monitor all ticklers, regardless of the user or tickler user group assigned to the tickler.

When the system creates a tickler, the system assigns the tickler:

- to a tickler user group, if the event rule or event that created the tickler has an Assign to user group defined. Tickler users can work with ticklers for their group at the Work with Tickler Screen (group view).
- to a tickler supervisor group, if the event rule or event that created the tickler has a Supervisor group defined. Supervisors can monitor ticklers for their group at the Workflow Management screen (supervisor group view).

A user can belong to multiple tickler groups.

Example: User KBROWN belongs to the HO-U-AT user group (ticklers created for the HO event and the rule is paytype hold reason AT) and the HO-S-AV supervisor group (ticklers created for the HO event and the rule is paytype hold reason is AV).



In this topic:

- Work with Tickler User Group Screen
- Create Tickler User Group Screen
- Display Users In Group Screen

For more information:

- Workflow Management Overview and Setup
- Tickler Assignment

Work with Tickler User Group Screen

Purpose: Use this screen to create, change, or delete a tickler group. You can also define the users that belong to a tickler group.

> **Note:**
>
> This menu option is not company specific; tickler user groups are created across companies.

How to display this screen: Enter WTUG in the Fast path field or select Work with Tickler User Group from a menu.

Field	Description
Group ID	A code for a group of users that work with ticklers. Alphanumeric, 10 positions; optional.
Description	A description of the tickler group. Alphanumeric, 40 positions; optional.
Type	The type of tickler group. S = Tickler supervisor group. U = Tickler user group. Alphanumeric, 1 position; optional.

Screen Option	Procedure
Create a tickler group	Select Create to advance to the Create Tickler User Group Screen.

Screen Option	Procedure
Change a tickler group	Select Change for a tickler group to advance to the Change Tickler User Group Screen. You can change any field except the group ID code. See the Create Tickler User Group Screen for field descriptions.
Delete a tickler group	Select Delete for a tickler group to delete it. **Note:** The system allows you to delete a tickler group that is currently assigned to a tickler event, event rule, or open or in use tickler.
Display a tickler group	Select Display for a tickler group to advance to the Display Tickler User Group Screen. You cannot change any information at this screen. See the Create Tickler User Group Screen for field descriptions.
Review the users in a tickler group	Select Users in group for a tickler group to advance to the Display Users In Group Screen.

Create Tickler User Group Screen

Purpose: Use this screen to create a tickler group.

How to display this screen: Select Create at the Work with Tickler User Group Screen.

Field	Description
Group ID	A code for a tickler group. You cannot create a duplicate tickler user group: Tickler User Group already exists. The system considers a tickler group a duplicate if the group ID code is used for another tickler group, regardless of the setting of the Type field. For example, you cannot have a UP supervisor tickler group and a UP user tickler group. Alphanumeric, 10 positions. Create screen: required. Change screen: display-only.
Description	A description of the tickler group. Alphanumeric, 40 positions; required.
Type	Indicates the type of tickler group. Supervisor = Supervisor tickler group; users in this group monitor ticklers assigned to their group. User = User tickler group; users in this group work with and resolve ticklers assigned to their group. Alphanumeric, 1 position; required.

Field	Description
E-mail address	The email address associated with the tickler supervisor group; this is the email address where ticklers assigned to this tickler group are sent. You can enter an email address only for supervisor (type S) tickler groups. You can enter only one email address in this field. When you enter an email address, the system verifies that: • there is an @ sign and a period (.) • there is some text before the @ sign • there is some text between the @ sign and the period • there is some text after the period The system confirms that your entry meets certain minimum formatting requirements, but not that it represents a valid, active email address. Alphanumeric, 50 positions; optional.

Display Users In Group Screen

Purpose: Use this screen to review the users assigned to a tickler group.

You can assign users to a tickler group at the Work with User Tickler Group Screen.

How to display this screen: Select Users in group for a tickler group at the Work with Tickler User Group Screen.

Field	Description
Group ID	The code and description of the tickler group assigned to the displayed users. Code: Alphanumeric, 10 positions; display-only. Description: Alphanumeric, 40 positions; display-only.
User	The user ID of the user assigned to the tickler group. Alphanumeric, 10 positions; display-only.
Name	The name of the user assigned to the tickler group. Alphanumeric, 30 positions; display-only.

Working with Tickler Category (WTCT)

Purpose: Use this menu option to create, change, or delete a tickler category.

Tickler categories allow you to group ticklers by the event or event rule associated with the tickler. When you define settings for a tickler event or event rule, you can define the tickler category to assign to the ticklers created for the event/rule. You can scan for ticklers by tickler category at the Work with Tickler Screen (user/group view) (tickler users) and Workflow Management Screen (tickler supervisors).

Example: To view only ticklers created for a specific HO rule, create a tickler category for each HO rule you create. This way you can view all ticklers created for HO rule 1 (pay type hold reason is AT) versus ticklers created for HO rule 2 (order hold reason is SF). In this example, tickler category for rule 1 may be HAT and tickler category for rule 2 may be HSF.

In this topic:

- Work with Tickler Category Screen
- Create Tickler Category Screen

For more information:

- Workflow Management Overview and Setup.
- Working with Tickler Events (WTEV)

Work with Tickler Category Screen

Purpose: Use this screen to create, change, or delete a tickler category.

How to display this screen: Enter WTCT in the Fast path field or select Work with Tickler Category from a menu.

Field	Description
Cat (Category)	A code for a tickler category, used to group ticklers. Alphanumeric, 3 positions; optional.
Description	The description of the tickler category. Alphanumeric, 40 positions; optional.

Screen Option	Procedure
Create a tickler category	Select Create to advance to the Create Tickler Category Screen.
Change a tickler category	Select Change for a tickler category to advance to the Change Tickler Category Screen. You can change the description. See the Create Tickler Category Screen for field descriptions.
Delete a tickler category	Select Delete for a tickler category to delete it. **Note:** The system allows you to delete a tickler category that is currently assigned to a tickler event, event rule, or open or in process tickler.

Create Tickler Category Screen

Purpose: Use this screen to create a tickler category.

How to display this screen: Select Create at the Work with Tickler Category Screen.

Field	Description
Category	A code for a tickler category, used to group ticklers. You cannot create a duplicate tickler category: Tickler Category already exists. The system considers a tickler category a duplicate if the category code is used for another tickler category. Alphanumeric, 3 positions. Create screen: required. Change screen: display-only.
Description	A description of a tickler category. Alphanumeric, 40 positions; required.

Working with Tickler Resolution Reason (WTRR)

Purpose: Use this menu option to create, change, and delete tickler resolution reasons.

Tickler resolution reasons are assigned to ticklers once they are resolved, indicating the reason why the tickler is resolved.

You can define a tickler resolution reason for a tickler event or event rule; when the system creates a tickler for the tickler event/rule, the system updates the Resolution reason field in the Tickler table.

It is recommended you create at least 2 ticklers resolution reasons: one reason to use when the system resolves the tickler, and one reason to use when you manually resolve a tickler.

In this topic:

- Work with Tickler Resolution Reason Screen
- Create Tickler Resolution Reason Screen

For more information:

- Workflow Management Overview and Setup
- Working with Tickler Events (WTEV)

Work with Tickler Resolution Reason Screen

Purpose: Use this screen to create, change, and delete tickler resolution reasons.

How to display this screen: Enter WTRR in the Fast path field or select Work with Tickler Resolution Reason from a menu.

Field	Description
Rsn (Tickler resolution reason code)	A code for a tickler resolution reason, indicating the reason why the tickler is resolved. Alphanumeric, 3 positions; optional.
Description	A description of the tickler resolution reason. Alphanumeric, 40 positions; optional.

Screen Option	Procedure
Create a tickler resolution reason	Select Create to advance to the Create Tickler Resolution Reason Screen.
Change a tickler resolution reason	Select Change for a tickler resolution reason to advance to the Change Tickler Resolution Reason Screen. You can change the description. See the Create Tickler Resolution Reason Screen for field descriptions.
Delete a tickler resolution reason	Select Delete for a tickler resolution reason to delete it. **Note:** The system allows you to delete a tickler resolution reason that is currently assigned to a tickler event, event rule, or open or in process tickler.

Create Tickler Resolution Reason Screen

Purpose: Use this screen to create a tickler resolution reason.

How to display this screen: Select Create at the Work with Tickler Resolution Reason Screen.

Field	Description
Reason (Tickler resolution reason code)	A code for a tickler resolution reason, indicating the reason why the tickler is resolved. You cannot create a duplicate tickler resolution reason: Tickler Resolution Reason already exists. The system considers a tickler resolution reason a duplicate if the tickler resolution reason code is used for another tickler resolution reason. Alphanumeric, 3 positions. Create screen: required. Change screen: display-only.
Description	A description of the tickler resolution reason. Alphanumeric, 40 positions; required.

Working with Tickler Events (WTEV)

Purpose: Use this menu option to set up each system delivered tickler event, including:

- tickler event settings at the event level
- tickler event settings at the event rule level
- event rule criteria for each rule you create
- event rule procedures for each rule you create

In this topic:

- Defining Tickler Events and Event Rules
- Tickler Event Settings
  - Active Tickler Events and Rules
  - Tickler Assignment
  - Tickler Notification
  - Allowing Multiple Ticklers
  - Tickler Work Notes
  - Tickler Priority
  - Tickler Category
  - Tickler Resolution Reason
- Event Rule Settings
  - Event Rule Processing Sequence
  - Event Rule Criteria
  - Event Rule Procedures

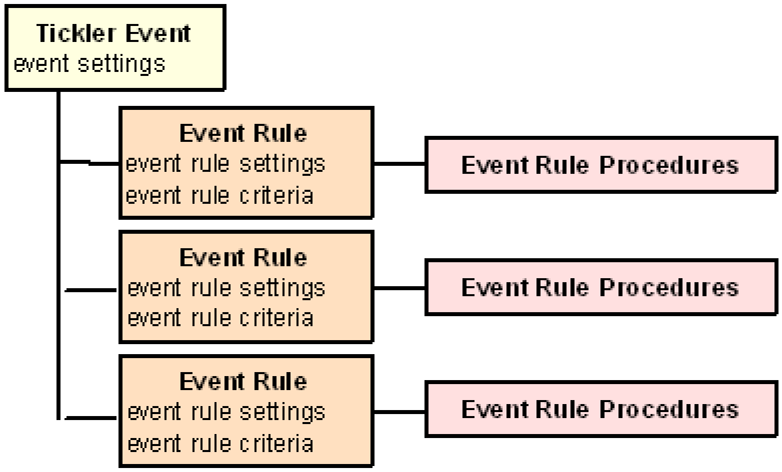
For more information: See Workflow Management Overview and Setup for an overview on workflow management.

Defining Tickler Events and Event Rules

To create a tickler, you must define:

- the tickler events that can create a tickler. There are system actions that can create ticklers. You cannot create other tickler events for the system to evaluate for tickler creation. Also, each tickler event is delivered as not active.
- BO: backorders
- CO: cancelled orders
- HO: held orders
- MN: manually created ticklers
- NO: new orders
- OO: aged open orders
- SD: stored value card activation decline
- SO: soldout orders
- SV: stored value card number assignment
- UP: unconfirmed pick tickets
- VP: voided pick tickets
- WF: ticklers received from a remote system
- Tickler Event Settings
- event rule settings that override the settings defined at the event level and determine how the event rule is processed; see Event Rule Settings.
- event rule criteria that define the criteria the system action must meet to create a tickler; see Event Rule Criteria.
- event rule procedures that define the instructions a user should follow to work with and resolve a tickler created by the event rule; see Event Rule Procedures.

Tickler event hierarchy: For each tickler event, you can define multiple event rules. For each event rule, you can define procedures to resolve the tickler.



Working with Tickler Users/User Groups (WTIC)

Purpose: Use this menu option to review, work with, and resolve ticklers in a tickler work queue. Users can work with ticklers assigned to themselves or their tickler user groups.

Tickler supervisors: Tickler supervisors can review and work with ticklers assigned to their tickler supervisor group, or review all ticklers regardless of assignment, using the Workflow Management (WWFM) menu option.

In this topic:

- Work with Tickler Screen (user/group view)
- Create Tickler Screen
- Change Tickler Screen
- Work with Tickler Notes Screen
- Work with Tickler History Screen
- Display Tickler History Screen
- Resolve Tickler Window
- Current Tickler Count Window
- Select User Tickler Group Screen
- Select Tickler User Group Screen

Work with Tickler Screen (user/group view)

Purpose: Use this screen to review, work with, and resolve ticklers assigned to a particular user's work queue or the tickler user groups defined for the user.

View current or future ticklers? The word CURRENT or FUTURE displays in the upper right corner of the screen indicating if you are viewing:

- ticklers whose Assigned date is equal to or past the current date (current), or
- ticklers whose Assigned date is later than the current date (future)

Select Current/future to toggle between viewing current ticklers or future ticklers; when you first advance to this screen, current ticklers display.

View open or resolved ticklers? The word OPEN or RESOLVED displays in the upper right corner of the screen indicating if you are viewing:

- ticklers whose Status is O (open) or I (in process), or
- ticklers whose Status is R (resolved)

Select Open/resolved to toggle between viewing open and in process ticklers or resolved ticklers; when you first advance to this screen, open ticklers display.

View FIFO or LIFO sequence? The word FIFO or LIFO displays in the left column to indicate how ticklers sort on the screen:

- select FIFO to display ticklers in FIFO (first in, first out; meaning oldest to newest) sequence, or
- select LIFO to display ticklers in LIFO (last in, first out; meaning newest to oldest) sequence

When you first advance to this screen, ticklers display in FIFO sequence (meaning the word LIFO displays in the left column, indicating you can switch the view to LIFO sequence).

View ticklers for user or tickler group? The User field or Group field displays at the top of the screen indicating if you are viewing:

- ticklers assigned to a particular user, or
- ticklers assigned to a particular tickler group for the user

Select User or Group to toggle between viewing ticklers for a particular user or tickler group for the user; when you first advance to this screen, ticklers display for the user who advanced to the screen. If the user is assigned to more than one tickler group, the Select User Tickler Group Screen displays when you toggle to view ticklers for a tickler group.

Searching for ticklers: You can search for specific ticklers by tickler status, tickler priority, assigned date, event code, tickler category, tickler number, order number, sold to customer number, bill to customer number, and item number.

How to display this screen: Enter WTIC in the Fast path field or select Work with Tickler by User/User Group from a menu.

Field	Description
User	The user ID and description of the user assigned to work with the displayed ticklers. This field displays only if you are viewing ticklers for the signed-in user; you can view ticklers for a tickler user group defined for the user by selecting Group; if the user is assigned to more than one tickler user group, the system advances you to the Select User Tickler Group Screen where you can select the tickler user group whose ticklers you wish to review. User ID: Alphanumeric, 10 positions; display-only. User description: Alphanumeric, 30 positions; display-only.
Group	The tickler user group ID and description of the tickler user group assigned to resolve the displayed ticklers. This is a tickler user group assigned to the user reviewing ticklers. This field displays only if you viewing ticklers for a tickler user group; you can view ticklers for the signed-in user by selecting User. Group ID: Alphanumeric, 10 positions; display-only.

Field	Description
S (Tickler status)	The status of the tickler. • O = Open; the tickler is open and is available to work on in the assigned tickler work queue. • I = In process; the tickler is currently being worked on by the assigned user. • R = Resolved; the tickler has been resolved. Alphanumeric, 1 position; optional.
P (Tickler priority)	The priority of the tickler, indicating how important the issue associated with the tickler is to resolve (1 is the lowest priority and 9 is the highest priority). Numeric, 1 position; optional.
Assign date	The date the tickler was assigned to the user or tickler user group. Numeric, 6 positions (user date format); optional.
Event code	The code for the tickler event that created the tickler. • BO = Backorders • CO = Cancelled orders • HO = Held orders • MN = Manually created • NO = New orders • OO = Aged open orders • SO = Sold out orders • UP = Unconfirmed pick tickets • VP = Voided pick tickets • WF = Remote workflow See System Delivered Tickler Events. Alphanumeric, 2 positions; optional.
Event Cat (Event category)	The tickler category assigned to the tickler. Tickler categories are defined in and validated against the Tickler Category table; see Working with Tickler Category (WTCT). Alphanumeric, 3 positions; optional.
Tickler number	The tickler number assigned to the tickler, from the Tickler Number number assignment record. Numeric, 9 positions; optional.
Order status	The status of the order associated with the tickler. • Open • Archived (This option is not currently implemented) • Cancelled • Held (**Note:** The system highlights the held status in a different color (for example fuchsia) if the sold to customer is a new customer, based on purchase history. A new customer has placed an order, but no orders have shipped (# orders LTD is equal to or greater than 1 and # sales LTD is equal to 0 in the Customer Sold To Order History table)). • Purged • Suspended • Closed Alphanumeric, display-only.

Field	Description
Order number	The order associated with the tickler. Numeric, 8 positions; optional.
Sold to	The sold to customer associated with the tickler. Numeric, 9 positions; optional.
Bill to	The bill to customer associated with the tickler. Numeric, 7 positions; optional.
Item	The item associated with the tickler. Alphanumeric, 12 positions; optional.

Screen Option	Procedure
Change a tickler	Select Change for a tickler to advance to the Change Tickler Screen.
Delete a MN tickler	Select Delete for a tickler to delete it. You can only delete MN (manually created) ticklers.
Display a tickler	Select Display for a tickler to advance to the Display Tickler Screen. You cannot change any fields on this screen. See the Change Tickler Screen for field descriptions.
Release the order associated with the tickler from hold	Select Release for a tickler to advance to the Release Reason Prompt Pop-Up Window (order header hold), Release Reason Prompt Pop-Up Window (recipient hold), and/or Release Order Payment Method Window (pay type hold). If you release an order from hold for an HO tickler, the system automatically resolves the tickler. Also, the system evaluates any other ticklers associated with the order to determine if they can be resolved. **Pick slip preparation:** When you release an order from hold, the system determines whether the order is eligible for pick slip preparation; see Preparing Orders for Pick Slip Generation. Errors: • If you select Release for a tickler not associated with a held order, an error message indicates: Order not on hold. • If you select Release for a tickler not associated with an order, an error message indicates: Tickler not eligible for this option. **Note:** You must have authority to the Release Held Orders (ERHO) menu option to release the order from hold.
Select a tickler to work on	Select In Process for a tickler to change the status of the tickler from open (O) to in process (I). You can only select to work with a tickler that is in an open status; if you select In process for a tickler that is in an in process (I) or resolved (R) status, an error message indicates: Tickler status cannot be changed - resolved or already in process. Selecting this option automatically assigns the tickler to the user and creates a tickler history record. If you are on the Work with Tickler screen (group view), the tickler is cleared from the screen; you can view the tickler on the Work with Tickler screen (user view).

Screen Option	Procedure
Enter or review tickler work notes	Select Notes for a tickler to advance to the work notes screen, based on the note type defined for the tickler. Note type A advances you to the Edit Customer Actions Window. Note type B advances you to the Work with Bill To Notes Screen. Note type O advances you to the Work with Order Messages Screen. Note type S advances you to the Edit Customer Notes Screen. Note type T advances you to the Work with Tickler Notes Screen.
Review the tickler source	Select Detail for a tickler to advance to the source screen, based on the tickler event associated with the tickler. BO, CO, HO, NO, OO, SO, UP, VP, and WF ticklers advance you to the Order Inquiry Header Screen. You cannot view the source for MN ticklers: Requested tickler has no source reference.
Review tickler history	Select History for a tickler to advance to the Work with Tickler History Screen.
Resolve a tickler	Select Resolve for a tickler to advance to the Resolve Tickler Window.
Review procedures for a tickler	Select Procedure for a tickler to advance to the Work with Tickler Event Rule Procedure Screen. You cannot add or change tickler procedures when you advance from the Work with Tickler screen. You cannot review procedures for MN ticklers.
Toggle between viewing ticklers for a user or ticklers for a tickler group	Select Group or User. The system toggles between displaying: • ticklers assigned to the user (the user ID and description displays at the top of the screen). • ticklers assigned to the user's tickler group (the group ID and description displays at the top of the screen). If the user is associated with more than one tickler group, you advance to the Select User Tickler Group Screen. If the user is not associated with a tickler group an error message indicates: Current user is not associated with any group.
Create a tickler for the MN (manually created) tickler event	Select Create to advance to the Create Tickler Screen. **Note:** To create a MN tickler, you must have authority to the Create Manual Tickler (B13) secured feature and the MN tickler event must be active.
Toggle between displaying ticklers in LIFO sequence (last in, first out; meaning newest to oldest) or FIFO sequence (first in, first out; meaning oldest to newest)	Select LIFO or FIFO. • The word LIFO displays when you are viewing ticklers in FIFO sequence. • The word FIFO when you are viewing ticklers in LIFO sequence.
Toggle between displaying ticklers in a current status or future status	Select Current/Future. The word CURRENT or FUTURE displays in the top right corner of the screen, depending on which ticklers you are viewing.
Review the number of ticklers in the work queue, based on the selection criteria you have defined	Select Count to advance to the Current Tickler Count Window.

Screen Option	Procedure
Review ticklers for a selected tickler user group	Select Group to advance to the Select User Tickler Group Screen. This option is available only when you are viewing ticklers in a tickler user group work queue.
Toggle between displaying open and in process ticklers or resolved ticklers	Select Open/Resolved. The system toggles between displaying: • ticklers in an open (O) or in process (I) status. • ticklers in a resolved (R) status.

Create Tickler Screen

Purpose: Use this screen to create a tickler for the MN (manually created) tickler event.

You cannot create a tickler for any tickler event except MN (manually created).

When you manually create a tickler you can associate the tickler with a specific:

- order number and ship to number
- customer sold to number
- customer ship to number
- customer bill to number
- existing tickler number

Depending on how you advance to the Create Tickler screen, the system automatically associates the tickler with a specific order or customer. For example, if you advance to the Create Tickler screen from the Work with Ticklers Screen (sold to customer view), the system automatically associates the manually created tickler with the sold to customer.

Secured feature: To create a MN tickler, you must have authority to the Create Manual Tickler (B13) secured feature.

How to display this screen: Select Create at the Work with Tickler Screen (user/group view) or Workflow Management Screen (tickler supervisor).

You can also advance to this screen from the:

- Work with Ticklers Screen (sold to customer view)
- Work with Ticklers Screen (ship-to customer view)
- Work with Ticklers Screen (bill-to customer view)
- Work with Ticklers Screen (order view)
- Work with Return Authorization Detail Screen
- Work with Returns for Order Screen
- Work with Email by Order Number Screen
- Work with Email by Customer Sold To Number Screen
- Work with Email by Customer Ship To Number Screen
- Work with Email by Customer Bill To Number Screen
- Display Item Availability Screen

Field	Description
Tickler number	The next number available from the Tickler Number number assignment record. Numeric, 9 positions; display-only.
Category	The tickler category assigned to the tickler. The tickler category defined for the MN tickler event defaults, but you can override it. Alphanumeric, 3 positions; required.
Priority	The priority of the tickler, indicating how important the issue associated with the tickler is to resolve (1 is lowest priority, 9 is highest priority). The priority defined for the MN tickler event defaults, but you can override it. Numeric, 1 position; optional.
Notify user	Indicates whether the system sends a Tickler Notification email to the assigned user or to all of the users in the assigned tickler user group when a tickler is created for this tickler event. • selected = Notify the assigned user/user group when a tickler is created; use the email address defined for the user in the User Extended table. If the tickler is assigned to a user group, send a notification to each user in the group, using the email address defined for each user in the User Extended table. • unselected = Do not notify the assigned user/user group when a tickler is created; the user can review the ticklers in his queue at the Work with Tickler Screen (user/group view). See Tickler Notification for a sample email.
Assign to user	The user ID of the user assigned to resolve the tickler. The assign to user defined for the MN tickler event defaults, but you can override it. You can define either an assign to user or assign to user group for the tickler, but not both. Users are defined in and validated against the User table; see Working with User Records (WUSR). See Tickler Assignment. Alphanumeric, 10 positions; optional.

Field	Description
Assign to group	The group ID of the tickler group assigned to resolve the tickler; when you manually create a tickler, the tickler group can be either a user group or supervisor group. The assign to group defined for the MN tickler event defaults, but you can override it. You can define either an assign to user or assign to user group for the tickler, but not both. The tickler user group you enter must be defined as a user type and not a supervisor type. Tickler user groups are defined in and validated against the Tickler User Group table; see Working with Tickler User Groups (WTUG). See Tickler Assignment. Alphanumeric, 10 positions; optional.
Assigned date	The date the tickler is assigned to the assigned to user or assigned to tickler user group. The current date defaults, but you can enter a future date. If you enter a future date, the tickler does not display in the assigned to tickler work queue until the assigned date is equal to the current date. **Note:** When you manually create a tickler and assign the tickler a future date, the system sends a Tickler Notification email when the tickler is created, not when the assigned future date is reached. You cannot enter a past date or an error message indicates: Must enter current date or future date. Numeric, 6 positions (user date format); required.
Note type	The type of notes you enter for this tickler. The note type defined for the MN tickler event defaults, but you can override it. • Sold To Action Notes = Action notes; you use the Edit Customer Actions Window to enter tickler notes. • Bill To Notes = Bill to notes; you use the Work with Bill To Notes Screen to enter tickler notes. • Order Notes = Order notes; you use the Work with Order Messages Screen to enter tickler notes. • Sold To Notes = Sold to notes; you use the Edit Customer Notes Screen to enter tickler notes. • Tickler Notes (default) = Tickler notes; you use the Work with Tickler Notes Screen to enter tickler notes. Alphanumeric, required.
Short note	A brief note you can enter for the tickler. The short note you enter displays on the Tickler Notification email and, if you reassign this tickler to another user or tickler user group, the short note displays on the Tickler Reassignment email. See Tickler Notification for a sample email. Alphanumeric, 60 positions; optional.

Field	Description
Order number	The order number and ship to number associated with the tickler. If you define an order number, you must also define the customer ship to number; if the order is associated with only 1 ship to, ship to number 1 defaults. Order numbers are defined in and validated against the Order Header table. Numeric, 8 positions; optional.
Cust sold to number	The customer sold to number associated with the tickler. Sold to customers are defined in and validated against the Customer Sold To table. Numeric, 9 positions; optional.
Cust ship to number	The customer ship to number associated with the tickler. If the order number you define is associated with only 1 ship to customer, ship to 1 defaults. Ship to customers are defined in and validated against the Customer Ship To table. Numeric, 3 positions; optional.
Cust bill to number	The customer bill to number associated with the tickler. Bill to customers are defined in and validated against the Customer Bill To table. Numeric, 7 positions; optional.
Related tickler number	The tickler number associated with the tickler. Tickler numbers are defined in and validated against the Tickler table. Numeric, 9 positions; optional.

Screen Option	Procedure
Enter work notes for the newly created tickler	Select OK to advance to the work notes screen, based on the note type defined for the tickler. • Note type Sold To Action Notes advances you to the Edit Customer Actions Window. • Note type Bill To Notes advances you to the Work with Bill To Notes Screen. • Note type Order Notes advances you to the Work with Order Messages Screen. • Note type Sold To Notes advances you to the Edit Customer Notes Screen. • Note type Tickler Notes advances you to the Work with Tickler Notes Screen.

Change Tickler Screen

Purpose: Use this screen to change a tickler.

You can change the following information for a tickler:

- tickler status

- tickler priority
- tickler category
- assigned to user/user group
- assigned date; you can enter a future assigned date to have a tickler assigned to a user or tickler user group in the future; ticklers with a future assign date do not display in a tickler work queue until the assign date is equal to the current date.
- short note

> **Note:**
>
> Each time you advance to this screen to change a tickler, the system creates a tickler history record; see Work with Tickler History Screen.

How to display this screen: Select Change for a tickler at the Work with Tickler Screen (user/group view) or Workflow Management Screen (tickler supervisor).

Field	Description
Tickler #	The tickler number whose information you are reviewing. Numeric, 9 positions; display-only.
Sts (Status)	The status of the tickler. • Open = Open; the tickler is open and is available to work on in the assigned user's or user group's work queue. • In Process = In process; the tickler is currently being worked on by the assigned user. **Note:** You cannot change the status of an open or in process tickler to resolved; to resolve a tickler select Resolve for a tickler at the Work with Tickler Screen (user/group view) or Workflow Management (WWFM) (tickler supervisor). You cannot change the status of a resolved tickler. The system creates a tickler history record when you change the tickler status, indicating the "from status" and the "to status"; see Work with Tickler History Screen. Alphanumeric, required.
Pty (Priority)	The priority of the tickler, indicating how important the issue associated with the tickler is to resolve (1 is the lowest priority, 9 is the highest priority). The system creates a tickler history record when you change the tickler priority, indicating the "from priority" and "to priority"; see Work with Tickler History Screen. Numeric, 1 position; required.

Field	Description
Note type	The type of notes you enter for this tickler. • Sold To Action Notes = Action notes; you use the Edit Customer Actions Window to enter tickler notes. • Bill To Notes = Bill to notes; you use the Work with Bill To Notes Screen to enter tickler notes. • Order Notes = Order notes; you use the Work with Order Messages Screen to enter tickler notes. • Sold To Notes = Sold to notes; you use the Edit Customer Notes Screen to enter tickler notes. • Tickler Notes (default) = Tickler notes; you use the Work with Tickler Notes Screen to enter tickler notes. Alphanumeric, display-only.
Event	The code and description for the tickler event that created the tickler. • BO = Backorders • CO = Cancelled orders • HO = Held orders • MN = Manually created • NO = New orders • OO = Aged open orders • SO = Sold out orders • UP = Unconfirmed pick tickets • VP = Voided pick tickets • WF = Remote workflow Alphanumeric, 2 positions; display-only.
Rule number	The rule sequence number and description defined for the event rule that created the tickler. Numeric, 3 positions; display-only.
Category	The tickler category assigned to the tickler. The system creates a tickler history record when you change the tickler category, indicating the “from category” and “to category”; see Work with Tickler History Screen. You must define a tickler category for manually created ticklers: Tickler category is required for manually created ticklers. Alphanumeric, 3 positions; optional.
Assign to user	The user ID and description of the user assigned to resolve the tickler. The system creates a tickler history record when you change the assign to, indicating the “from assign to” and “to assign to”; see Work with Tickler History Screen. You can define either an assign to user or assign to user group for the tickler, but not both. Users are defined in and validated against the User table; see Working with User Records (WUSR). See Tickler Assignment. Alphanumeric, 10 positions; optional.

Field	Description
Assign to group	The group code and description of the tickler group assigned to resolve the tickler; when you change a tickler, the tickler group can be either a user group or supervisor group. The system creates a tickler history record when you change the assign to, indicating the “from assign to” and “to assign to”; see Work with Tickler History Screen. You can define either an assign to user or assign to user group for the tickler, but not both. The tickler user group you enter must be defined as a user type and not a supervisor type. Tickler user groups are defined in and validated against the Tickler User Group table; see Working with Tickler User Groups (WTUG). See Tickler Assignment. Alphanumeric, 10 positions; optional.
Supervisor group	The code and description for the supervisor group assigned to manage the tickler. This is the supervisor group the system sends a Supervisor Notification Count email when the date in the Date to notify supervisor field is reached. The system sends an email to the email address defined for the supervisor group in the Tickler User Group table. Alphanumeric, 10 positions; display-only.
Assigned date	The date the tickler was assigned to the user or tickler user group. You can enter a future assigned date to have a tickler assigned to a user or user group in the future. The system creates a tickler history record when you change the assigned date, indicating the “from assigned date” and “to assigned date”; see Work with Tickler History Screen. If you enter a future date, the tickler does not display in the assigned to tickler work queue until the assigned date is equal to the current date. You cannot enter a past date or an error message indicates: Must enter current date or future date. Numeric, 6 positions (user date format); required.
Date to notify supervisor	Indicates the date the system sends a Supervisor Notification Count email to the assigned supervisor group, notifying the supervisor that the tickler has not yet been resolved. The system sends a Supervisor Notification Count email if the date to notify supervisor is equal to or past the current date. The system uses this calculation to determine the next notification date when a tickler is first created: tickler creation date + value in Number of days to notify supervisor field for the event/rule that created the tickler = next notification date. The system does not update the next notification date after a tickler is created. The system sends the email to the email address defined for the supervisor user group in the Tickler User Group table. The system continues sending an email to the supervisor group as long as the tickler assigned to the supervisor group is in an open or in process status. See Tickler Notification for a sample email. Numeric, 6 positions (user date format); display-only.

Field	Description
Created by user	The user ID of the user that created the tickler. Alphanumeric, 10 positions; display-only.
Created on...at	The date and time when the tickler was created. Created date: Numeric, 6 positions (user date format); display-only. Created time: Numeric, 6 positions (HHMMSS format); display-only.
Source	The program that created the tickler. Alphanumeric, 10 positions; display-only.
Original user	The user ID of the user originally assigned to resolve the tickler. Alphanumeric, 10 positions; display-only.
Original group	The code for the tickler user group originally assigned to resolve the tickler. Alphanumeric, 10 positions; display-only.
Short note	A brief note you can enter to further describe the tickler. This note displays on the Tickler Notification email and Tickler Reassignment email. Alphanumeric, 60 positions; optional.
Order #	The order number and ship to number associated with the tickler. Order number: Numeric, 8 positions; display-only. Ship to number: Numeric, 3 positions; display-only.
Cust sold to #	The customer sold to number associated with the tickler. Numeric, 9 positions; display-only.
Cust ship to #	The customer ship to number associated with the tickler. Numeric, 3 positions; display-only.
Cust bill to #	The bill to customer number associated with the tickler. Numeric, 7 positions; display-only.
Item/SKU	The item and optionally, SKU, associated with the tickler. Item: Alphanumeric, 12 positions; display-only. SKU: Alphanumeric, 14 positions; display-only.
Pick control #	The pick control number associated with the tickler. Numeric, 7 positions; display-only.
Related tickler #	The tickler number associated with the tickler. Numeric, 9 positions; display-only.
Email sequence #	The email sequence number associated with the tickler. Numeric, 11 positions; display-only.

Screen Option	Procedure
Enter or change work notes for the tickler	Select Notes to advance to the work notes screen, based on the note type defined for the tickler. • Note type Sold To Action Notes advances you to the Edit Customer Actions Window. • Note type Bill To Notes advances you to the Work with Bill To Notes Screen. • Note type Order Notes advances you to the Work with Order Messages Screen. • Note type Sold To Notes advances you to the Edit Customer Notes Screen. • Note type Tickler Notes advances you to the Work with Tickler Notes Screen.

Work with Tickler Notes Screen

Purpose: Use this screen to enter work notes regarding the activity a user performed to resolve the tickler.

Tickler work notes screen: The screen where you enter activity notes for a tickler varies, depending on the note type defined for the tickler in the Tickler table.

Tickler work notes screen: The screen where you enter activity notes for a tickler varies, depending on the note type defined for the tickler in the Tickler table.

- Note type Sold To Action Notes advances you to the Edit Customer Actions Window.
- Note type Bill To Notes advances you to the Work with Bill To Notes Screen.
- Work with Order Messages Screen
- Note type Sold To Notes advances you to the Edit Customer Notes Screen.
- Note type Tickler Notes advances you to the Work with Tickler Notes Screen.

When you enter work notes on the Work with Tickler Notes screen and select OK, the system updates the work notes with the user ID of the user who entered the notes and the date when the work notes were entered.

Types of work notes: Select Resolution notes or Activity notes at this screen to toggle between entering and updating activity notes or resolution notes.

- activity notes describe the actions taken against a tickler that do not resolve the tickler. For example, if a tickler is created for a declined credit card, a user might enter activity notes indicating he reviewed the reason why the credit card was declined and assigned the tickler to another user to re-send for authorization. When a tickler is first created, the system creates an activity note: XX Tickler# 000003140 HAS BEEN CREATED. RULE:INITIAL B/O IS Y, where XX is the tickler event associated with the tickler and the RULE is the event rule associated with the tickler.
- resolution notes describe the actions taken against a tickler that resolve the tickler. For example, if a ticker is created for a declined credit card, a user might enter resolution notes indicating he resent the credit card for authorization and received an approval (resolving the tickler). When a tickler is resolved, the system creates a resolution note: XX Tickler# 000003140 HAS BEEN RESOLVED. REASON: BO BY: KBROWN RULE:INITIAL B/O IS Y, where XX is the tickler event associated with the tickler, REASON is the resolution reason code, BY is the user ID of the person that resolved the tickler, and RULE is the event rule associated with the tickler.

How to display this screen: You can advance to this screen by:

- selecting Notes for a tickler at the Work with Tickler Screen (user/group view) or Workflow Management Screen (tickler supervisor).
- selecting OK at the Create Tickler Screen.
- selecting Notes at the Change Tickler Screen or Display Tickler Screen.

Field	Description
Tickler #	The tickler number for which you are entering or updating work notes. Numeric, 9 positions; display-only.
Activity notes /Resolution notes	Free-form lines where you can describe the activity performed against the tickler. • The name of the field is Activity notes if you are entering activity notes. • The name of the field is Resolution notes if you are entering resolution notes. Alphanumeric, 60 positions; optional.
User	The user ID of the user who entered the tickler work notes or who performed the activity that created the work notes. Alphanumeric, 10 positions; display-only.
Date	The date the tickler work notes were entered. Numeric, 6 positions (user date format); display-only.

Screen Option	Procedure
Enter new work notes or update existing work notes	Select Add/Change to toggle between adding new lines and updating existing lines.
Enter or update tickler resolution notes or tickler activity notes	Select Resolution notes or Activity notes to toggle between adding and updating tickler activity notes and adding and updating tickler resolution notes.

Work with Tickler History Screen

Purpose: Use this screen to review the history of a tickler, indicating the activity performed against the tickler.

The system creates a tickler history record when:

- the tickler is created
- the tickler is changed
- work notes for the tickler are added/updated, regardless of the type of work notes you enter
- the tickler is resolved

How to display this screen: Select History at the Work with Tickler Screen (user/group view) or Workflow Management Screen (tickler supervisor).

Field	Description
Tickler #	The tickler number whose history you are reviewing. Numeric, 9 position; display-only.
Activity date	The date when the system created the tickler history record; this is the date when the tickler was created or updated. Numeric, 6 positions (user date format); optional.
Activity time	The time when the system created the tickler history record; this is the time when the tickler was created or updated. Numeric, 6 positions (HH:MM:SS format); display-only.
Activity user	The user ID of the user that updated the tickler, creating the tickler history record. Alphanumeric, 10 positions; optional.
To user	The user ID of the user assigned to work with the tickler, based on the update performed against the tickler. Alphanumeric, 10 positions; display-only.
To group	The code for the user group assigned to work with the tickler, based on the update performed against the tickler. Alphanumeric, 10 positions; display-only.
To sts (To status)	The status of the tickler, based on the update performed against the tickler. • O = Open; the tickler is open and is available to work on in the assigned tickler work queue. • I = In process; the tickler is currently being worked on by the assigned user. • R = Resolved; the tickler has been resolved. Alphanumeric, 1 position; display-only.
To pty (To priority)	The priority assigned to the tickler, based on the update performed against the tickler (1 is the lowest priority and 9 is the highest priority). Numeric, 1 position; display-only.
To cat (To category)	The category assigned to the tickler, based on the update performed against the tickler. Alphanumeric, 3 positions; display-only.
Assign date	The date the tickler was assigned to the current user or tickler user group. Numeric, 6 positions (user date format); display-only.

Screen Option	Procedure
Review tickler history details	Select Display for a tickler to advance to the Display Tickler History Screen.

Display Tickler History Screen

Purpose: Use this screen to review the tickler history details.

This screen indicates the tickler detail changed from this (previous tickler detail), to that (current tickler detail), where the specific detail being updated is:

- assigned to user
- assigned to user group
- assigned to supervisor group
- tickler status
- tickler priority
- next notification date
- rule sequence number
- assigned date
- graduated date
- short note
- tickler category
- note change (indicating tickler work notes were added or updated)
- source program (indicating the program that created or updated the tickler)

> **Note:**
>
> The From detail is identical to the To detail if the detail was not updated for the tickler history record. For example, the From tickler status is identical to the To tickler status if the history record was created as a result of the tickler category changing from S1 to S2.

How to display this screen: Select Display for a tickler history record at the Work with Tickler History Screen.

Field	Description
Tickler #	The tickler number whose history you are reviewing. Numeric, 9 position; display-only.
Date	The date and time when the tickler was updated, creating this tickler history record. Date: Numeric, 6 positions (user date format); display-only. Time: Numeric, 6 positions (HH:MM:SS format); display-only.
User	The user ID of the user that updated the tickler, creating this tickler history record. Alphanumeric, 10 positions; display-only.
From user	The user ID and description of the user previously assigned to the tickler. Alphanumeric, 10 positions; display-only.
To user	The user ID and description of the user currently assigned to the tickler. Alphanumeric, 10 positions; display-only.

Field	Description
From user group	The code and description of the tickler user group previously assigned to the tickler. Alphanumeric, 10 positions; display-only.
To user group	The code and description of the tickler user group currently assigned to the tickler. Alphanumeric, 10 positions; display-only.
From supervisor group	The code and description of the tickler supervisor group previously assigned to the tickler. Alphanumeric, 10 positions; display-only.
To supervisor group	The code and description of the tickler supervisor group currently assigned to the tickler. Alphanumeric, 10 positions; display-only.
From status	The code for the status previously assigned to the tickler. Alphanumeric, 1 position; display-only.
To status	The code for the status currently assigned to the tickler. Alphanumeric, 1 position; display-only.
From priority	The priority previously assigned to the tickler. Numeric, 1 position; display-only.
To priority	The priority currently assigned to the tickler. Numeric, 1 position; display-only.
From next notify date	The next notification date previously assigned to the tickler. The next notification date is updated only for graduating ticklers (AR, OO, and UP tickler events). Numeric, 6 positions; display-only.
To next notify date	The next notification date currently assigned to the tickler. Numeric, 6 positions; display-only.
From rule seq #	The rule sequence number and description previously assigned to the tickler. Numeric, 3 positions; display-only.
To rule seq #	The rule sequence number and description currently assigned to the tickler. Numeric, 3 positions; display-only.
From assigned date	The assigned date and time previously assigned to the tickler. Date: Numeric, 6 positions (user date format); display-only. Time: Numeric, 6 positions (HH:MM:SS format); display-only.
To assigned date	The assigned date and time currently assigned to the tickler. Date: Numeric, 6 positions (user date format); display-only. Time: Numeric, 6 positions (HH:MM:SS format); display-only.
From graduated date	The graduated date previously assigned to the tickler. Numeric, 6 positions (user date format); display-only.
To graduated date	The graduated date currently assigned to the tickler. Numeric, 6 positions (user date format); display-only.

Field	Description
From note	The short note previously assigned to the tickler. Alphanumeric, 60 positions; display-only.
To note	The short note currently assigned to the tickler. Alphanumeric, 60 positions; display-only.
From category	The tickler category previously assigned to the tickler. Alphanumeric, 3 positions; display-only.
To category	The tickler category currently assigned to the tickler. Alphanumeric, 3 positions; display-only.
Note change	Indicates if the tickler work notes have been updated. • Y = Tickler work notes have been added/updated. • N = Tickler work notes have not been added/updated.
Source program	The program that created or updated the tickler. Alphanumeric, 10 positions; display-only.

Resolve Tickler Window

Purpose: Use this window to select a resolution reason and resolve a tickler.

You can resolve ticklers that are in an O (open) or I (in process) status.

How to display this screen: Select Resolve for a tickler at the Work with Tickler Screen (user/group view) or Workflow Management Screen (tickler supervisor).

Field	Description
Tickler #	The tickler number you are resolving. Numeric, 9 positions; display-only.
Resolution reason	The tickler resolution reason, to identify the reason why the tickler is resolved. Tickler resolution reasons are defined in and validated against the Tickler Resolution Reason table; see Working with Tickler Resolution Reasons (WTRR). Alphanumeric, 3 positions; required.

Screen Option	Procedure
Enter tickler resolution notes	Select OK to advance to the work notes screen, based on the note type defined for the tickler. • Note type Sold To Action Notes advances you to the Edit Customer Actions Window. • Note type Bill To Notes advances you to the Work with Bill To Notes Screen. • Note type Order Notes advances you to the Work with Order Messages Screen. • Note type Sold To Notes advances you to the Edit Customer Notes Screen. • Note type Tickler Notes advances you to the Work with Tickler Notes Screen.

Current Tickler Count Window

Purpose: Use this window to review the number of ticklers currently in view, based on the selection criteria you defined at the Work with Tickler Screen (user/group view).

The selection criteria you can define is:

- tickler status
- tickler number
- priority
- assigned date
- event
- category
- current user
- supervisor group
- order number
- customer sold to number
- customer bill to number
- item

A value displays next to the fields you have selected as criteria.

Work with Tickler Screen (user/group view)
How to display this screen: Select Count at the Work with Tickler Screen (user/group view) or Workflow Management Screen (tickler supervisor).

Field	Description
Tickler count is	The number of ticklers currently in view, based on the selection criteria you defined at the Work with Tickler Screen (user/group view). Numeric, 9 positions; display-only.
Status	The status of the ticklers currently in view. Alphanumeric, 1 position; display-only.
Tickler #	The tickler number currently in view. Numeric, 9 positions; display-only.
Priority	The priority assigned to the ticklers currently in view. Numeric, 2 positions; display-only.
Assigned date	The assigned date of ticklers currently in view. Numeric, 6 positions (user date format); display-only.
Event	The event code assigned to ticklers currently in view. Alphanumeric, 2 positions; display-only.
Category	The tickler category assigned to ticklers currently in view. Alphanumeric, 3 positions; display-only.
Current user	The user ID of the user assigned to ticklers currently in view. Alphanumeric, 10 positions; display-only.

Field	Description
Supervisor group	The supervisor group assigned to ticklers currently in view. Alphanumeric, 10 positions; display-only.
Order #	The order number assigned to ticklers currently in view. Numeric, 8 positions; display-only.
Customer sold to #	The sold to customer assigned to ticklers currently in view. Numeric, 9 positions; display-only.
Customer bill to #	The bill to customer assigned to ticklers currently in view. Numeric, 7 positions; display-only.
Item	The item associated with the ticklers currently in view. Alphanumeric, 12 positions; display-only.

Select User Tickler Group Screen

Purpose: Use this screen to select the tickler group whose ticklers you wish to review.

How to display this screen:

- Select Group at the Work with Tickler Screen (user/group view). All tickler groups (both user and supervisor) assigned to the signed-in user display.
- Select Supervisor at the Workflow Management Screen. All tickler supervisor groups assigned to the signed-in user display.

Field	Description
User	The user ID of the signed-in user; this is the user whose tickler groups you are reviewing. Alphanumeric; 10 positions; display-only.
Group ID	The tickler group ID code of the tickler groups assigned to the signed-in user. Alphanumeric, 10 positions; optional.

Screen Option	Procedure
Select the tickler group whose ticklers you wish to review	Select a tickler group to advance to the: Work with Tickler Screen (user/group view) **for the group view.** Workflow Management Screen **for the supervisor view.**

Select Tickler User Group Screen

Purpose: Use this screen to select the tickler group whose ticklers you wish to review. You can also view the users assigned to each group.

The tickler group type indicates if the tickler group is a user group (type U) or supervisor group (type S).

How to display this screen:

- Select Select Group at the Work with Tickler Screen (user/group view). All tickler groups (both user and supervisor) assigned to the signed-in user display.

- Select Select Group at the Workflow Management Screen (supervisor view). All tickler supervisor groups (both user and supervisor) assigned to the signed-in user display.

Field	Description
Group ID	Work with Tickler Screen (user/group view): The group ID code of the tickler groups assigned to the signed-in user. Workflow Management Screen: The group ID code of a tickler supervisor group. This screen displays ALL tickler supervisor groups, regardless of tickler assignment. Tickler user groups do not display on the screen. Alphanumeric, 10 positions; optional.
Description	A description of the tickler group. Alphanumeric, 40 positions; optional.
Type	The type of tickler group. • S = Tickler supervisor group. • U = Tickler user group. Alphanumeric, 1 position; optional.

Screen Option	Procedure
Select the tickler group whose ticklers you wish to review	Select a tickler group to advance to the: Work with Tickler Screen (user/group view) for the group view. Workflow Management Screen for the supervisor group view.
Review the users in a tickler group	Select Users in group for a tickler group to advance to the Display Users In Group Screen.

Workflow Management (WWFM)

Purpose: Use this menu option to review, work with, and resolve ticklers in a tickler work queue. Tickler supervisors can work with ticklers assigned to their tickler supervisor groups or work with all ticklers, regardless of the tickler supervisor group assigned to the tickler.

Tickler users/groups: Tickler users can review and work with ticklers assigned to themselves or their tickler user groups using the Working with Tickler Users/User Groups (WTIC) menu option.

In this topic:

- Workflow Management Screen
- Reassign Ticklers Window

Workflow Management Screen

Purpose: Use this screen to review, work with, and resolve ticklers in a tickler work queue.

View current or future ticklers? The word CURRENT or FUTUREdisplays in the upper right corner of the screen indicating if you are viewing:

- ticklers whose Assigned date is equal to or past the current date (current), or
- ticklers whose Assigned date is later than the current date (future)

Select Current/future to toggle between viewing current ticklers or future ticklers; when you first advance to this screen, current ticklers display.

View open or resolved ticklers? The word OPEN or RESOLVED displays in the upper right corner of the screen indicating if you are viewing:

- ticklers whose Status is O (open) or I (in process), or
- ticklers whose Status is R (resolved)

Select Open/resolved to toggle between viewing open and in process ticklers or resolved ticklers; when you first advance to this screen, open ticklers display.

View FIFO or LIFO sequence? The word FIFO or LIFO displays in the upper left corner of the screen indicating if you are viewing:

- ticklers in FIFO (first in, first out; meaning oldest to newest) sequence, or
- ticklers in LIFO (last in, first out; meaning newest to oldest) sequence

Select FIFO or LIFO to toggle between viewing ticklers in FIFO sequence or LIFO sequence; when you first advance to this screen, ticklers display in FIFO sequence.

View all ticklers or for supervisor group? The word ALL or the Supervisor group field displays at the top of the screen indicating if you are viewing:

- all ticklers, regardless of the supervisor group assigned to the ticklers
- ticklers assigned to a particular tickler supervisor group for the signed-in user

Select Supervisor to toggle between viewing all ticklers or ticklers for a specific tickler supervisor group. When you first advance to this screen, ticklers for the supervisor group display if you are assigned to only one supervisor group. If you are assigned to none or more than one supervisor group, all ticklers display.

Searching for ticklers: You can search for specific ticklers by tickler status, tickler priority, created date, assigned date, event code, tickler category, tickler number, user group, user, and order number.

How to display this screen: Enter WWFM in the Fast path field or select Workflow Manager from a menu.

Field	Description
Supervisor group	The group ID and description of the tickler supervisor group assigned to monitor the displayed ticklers. This is a tickler supervisor group assigned to the user reviewing ticklers. This field displays only if you are viewing ticklers for a tickler supervisor group; you can view all ticklers by selecting All. Group ID: Alphanumeric, 10 positions; display-only.
Status	The status of the tickler. Open = The tickler is open and is available to work on in the assigned tickler work queue. In process = The tickler is currently being worked on by the assigned user. Resolved = The tickler has been resolved. Alphanumeric, 1 position; optional.

Field	Description
P (Tickler priority)	The priority of the tickler, indicating how important the issue associated with the tickler is to resolve (1 is the lowest priority and 9 is the highest priority). Numeric, 1 position; optional.
Create date	The date the tickler was created. Numeric, 7 positions (in user date format); optional.
Assign date	The date the tickler was assigned to the user or tickler user group. Numeric, 7 positions (in user date format); optional.
Cd (Event code)	The code for the tickler event that created the tickler. BO = Backorders CO = Cancelled orders HO = Held orders MN = Manually created NO = New orders OO = Aged open orders SO = Sold out orders UP = Unconfirmed pick tickets VP = Voided pick tickets WF = Remote workflow See System Delivered Tickler Events. Alphanumeric, 2 positions; optional.
Cat (Event category)	The tickler category assigned to the tickler. Tickler categories are defined in and validated against the Tickler Category table; see Working with Tickler Category (WTCT). Alphanumeric, 3 positions; optional.
Tickler number	The tickler number assigned to the tickler, from the Tickler Number number assignment record. Numeric, 9 positions; optional.
User group	The tickler user group assigned to the tickler. Tickler user groups are defined in and validated against the Tickler User Group table; see Working with Tickler User Groups (WTUG). Alphanumeric, 10 positions; optional.
User	The user assigned to the tickler. Users are defined in and validated against the User table; see Working with User Records (WUSR). Alphanumeric, 10 positions; optional.

Field	Description
Sts (Order status)	The status of the order associated with the tickler. blank = Open. A = Archived to optical disk. This option is not currently implemented. C = Cancelled. H = Held. **Note:** The system highlights the held status in a different color (for example fuchsia) if the sold to customer is a new customer, based on purchase history. A new customer has placed an order, but no orders have shipped (# orders LTD is equal to or greater than 1 and # sales LTD is equal to 0 in the Customer Sold To Order History table). P = Purged. S = Suspended. X = Closed. Alphanumeric, 1 position; display-only.
Order number	The order associated with the tickler. Numeric, 8 positions; optional.

Screen Option	Procedure
Change a tickler	Select Change for a tickler to advance to the Change Tickler Screen.
Delete a MN tickler	Select Delete for a tickler to delete it. You can only delete MN (manually created) ticklers.
Display a tickler	Select Display for a tickler to advance to the Display Tickler screen. See the Change Tickler Screen for more information.
Release the order associated with the tickler from hold	Select Release for a tickler to advance to the Release Reason Prompt Pop-Up Window (order header hold), Release Recipient Hold Reason Pop-Up Window (recipient hold), and/or Release Order Payment Method Window (pay type hold). If you release an order from hold for an HO tickler, the system automatically resolves the tickler. Also, the system evaluates any other ticklers associated with the order to determine if they can be resolved. If you select Release for a tickler not associated with a held order, an error message indicates: Order not on hold. If you select Release for a tickler not associated with an order, an error message indicates: Tickler not eligible for this option. **Note:** You must have authority to the Release Held Orders (ERHO) menu option to release the order from hold.

Screen Option	Procedure
Select a tickler to work on	Select In Process for a tickler to change the status of the tickler from open (O) to in process (I). You can only select to work with a tickler that is in an open status; if you select In process for a tickler that is in an in process (I) or resolved (R) status, an error message indicates: Tickler status cannot be changed - resolved or already in process. Selecting this option automatically assigns the tickler to the user and creates a tickler history record. If you are on the Workflow Management screen (supervisor view), the tickler is cleared from the screen; you can view the tickler on the Workflow Management screen (all ticklers view) or in the Working with Tickler Users/User Groups (WTIC) menu option.
Enter or review tickler work notes	Select Notes for a tickler to advance to the work notes screen, based on the note type defined for the tickler. Note type A advances you to the Edit Customer Actions Window. Note type B advances you to the Work with Bill To Notes Screen. Note type O advances you to the Work with Order Messages Screen. Note type S advances you to the Edit Customer Notes Screen. Note type T advances you to the Work with Tickler Notes Screen.
Review the tickler source	Select Detail for a tickler to advance to the source screen, based on the tickler event associated with the tickler. BO, CO, HO, NO, OO, SO, UP, VP, and WF ticklers advance you to the Order Inquiry Header Screen. You cannot view the source for MN ticklers: Requested tickler has no source reference.
Review tickler history	Select History for a tickler to advance to the Work with Tickler History Screen.
Resolve a tickler	Select Resolve for a tickler to advance to the Resolve Tickler Window.
Review procedures for a tickler	Select Procedure for a tickler to advance to the Work with Tickler Event Rule Procedure Screen. You cannot add or change tickler procedures when you advance from the Work with Tickler screen. You cannot review procedures for MN ticklers.

Screen Option	Procedure
Toggle between viewing all ticklers or ticklers for a tickler supervisor group	Select All or Supervisor. The system toggles between displaying: • all ticklers (the word ALL displays at the top right of the screen). • ticklers assigned to the user's tickler supervisor group (the supervisor group ID and description displays at the top of the screen). If the user is associated with more than one supervisor group, you advance to the Select User Tickler Group Screen. If the user is not associated with a tickler supervisor group an error message indicates: Current user is not associated with any group.
Create a tickler for the MN (manually created) tickler event	Select Create to advance to the Create Tickler Screen. **Note:** To create a MN tickler, you must have authority to the Create Manual Tickler (B13) secured feature and the MN tickler event must be active.
Toggle between displaying ticklers in LIFO sequence (last in, first out; meaning newest to oldest) or FIFO sequence (first in, first out; meaning oldest to newest)	Select LIFO or FIFO. The word LIFO or FIFO displays in the top left corner of the screen, depending on which tickler order you are viewing.
Toggle between displaying ticklers in a current status or future status	Select Current/future. The word CURRENT or FUTURE displays in the top right corner of the screen, depending on which ticklers you are viewing.
Review the number of ticklers in the work queue, based on the selection criteria you have defined	Select Count to advance to the Current Tickler Count Window.
Review ticklers for a selected tickler supervisor group	Select Select Group to advance to the Select User Tickler Group Screen. This option is available only when you are viewing tickles in a tickler supervisor group work queue.
Toggle between displaying open and in process ticklers or resolved ticklers	Select Open/resolved. The system toggles between displaying: • ticklers in an open (O) or in process (I) status. • ticklers in a resolved (R) status.
Reassign ticklers to another user/user group	Select Reassign to advance to the Reassign Tickler window.
Print the Tickler Listing By Current User/Group report	Enter a Supervisor group, User group, or User and select List. The system displays the message Job TKL_LIST submitted to job queue QBATCH and generates the Tickler Listing by Current User/Group report. This report lists the ticklers assigned to the specified user or group. **Note:** The error message A user, user group, or supervisor group must be entered first displays if you do not indicate the user or group for which you wish to generate the report.

Reassign Ticklers Window

Purpose: Use this window to reassign ticklers to another user or tickler user group.

The system reassigns all ticklers currently assigned to the From tickler user/group to the To tickler user/group; you cannot select a range of ticklers to reassign.

You can reassign a specific tickler to another tickler user or tickler user group at the Change Tickler Screen.

How to display this screen: Select Reassign at the Workflow Management Screen.

Field	Description
From tickler user	The user ID of the user currently assigned to the ticklers you wish to reassign. You can reassign ticklers from a user or tickler group, but not both. Users are defined in and validated against the User table; see Working with User Records (WUSR). Alphanumeric, 10 positions; required if From tickler group is blank.
From user group	The group ID of the tickler group currently assigned to the ticklers you wish to reassign; this can be a tickler user group or tickler supervisor group. You can reassign ticklers from a user or tickler group, but not both. Tickler groups are defined in and validated against the Tickler User Group table; see Working with Tickler User Groups (WTUG). Alphanumeric, 10 positions; required if From tickler user is blank.
To tickler user	The user ID of the user reassigned to the ticklers. You can reassign ticklers to a user or tickler user group, but not both. Users are defined in and validated against the User table; see Working with User Records (WUSR). Alphanumeric, 10 positions; required if To tickler group is blank.
To tickler user group	The group code of the tickler user group reassigned to the ticklers; this can be a tickler user group or tickler supervisor group. You can reassign ticklers to a user or tickler user group, but not both. Tickler user groups are defined in and validated against the Tickler User Group table; see Working with Tickler User Groups (WTUG). Alphanumeric, 10 positions; required if To tickler user is blank.

Purging Ticklers (MPTK)

Purpose: Use this menu option to purge resolved ticklers that are older than a specified purge date.

The system purges ticklers that are in an R (resolved) status; the system does not purge ticklers that are in an O (open) or I (in process) status.

Which date? The system looks at the Resolution date in the Tickler table for the resolved tickler to determine if the tickler is older than the purge date you specify.

Purge Tickler Screen

Use this screen to define the date you wish to use for purging ticklers. The system purges resolved ticklers whose Resolution date is older than the purge date you specify.

How to display this screen: Enter MPTK in the Fast path field or select Purge Ticklers from a menu.

Field	Description
Purge date	The date you wish to use for purging ticklers. The system purges ticklers that are in a resolved status whose Resolution date is older than the purge date you specify. Numeric, 6 positions (in user date format); required.

Screen Option	Procedure
Submit the Tickler Purge job to purge ticklers	Select Submit. The system displays the Confirm Accept window; select OK to submit the TKL_PURGE job.

Point of Sale Integration

Topics in this part: This part describes integration between Order Administration and a POS (point of sale) system.

- Point of Sale Integration Overview provides a brief overview of the various integrations available.
- *Generic Inventory Transaction Upload* describes the process of uploading inventory transactions.
- *Generic Item Download API* describes the process of downloading item/SKUs.
- *Generic Vendor Download API* describes the process of downloading vendors.
- *Generic Invoice Download API* describes the process of downloading invoices.
- Working with Outbound Interface Transactions (WOIT) allows you to review triggers in the IL Outbound Trigger table.
- Generating Outbound Interface Triggers (GOIT) describes how to create triggers in the IL Outbound Trigger table for item/SKUs, vendors, and/or invoices.
- *Generic Customer History API* describes how the system responds to requests for customer or order history information.
- *Generic Inventory Inquiry API* describes how the system responds to requests for inventory information about an item/SKU.
- *Generic Inventory Download API* describes the process of downloading item availability information.
- *Generic Customer Inquiry (Search) API* describes how the system responds to requests for customer records based on various search criteria.

- Work with Store Cross Reference (WSCR) describes how to set up a cross reference table to map store locations between Order Administration and an external system such as Order Orchestration or a POS application.
- Store Upload explains how to upload store cross reference information from an external system to create or update records the Store Cross Reference table.
- *Generic Customer Download API* describes the process of downloading customer information.
- Customer Engagement Batch Customer and Sales Integration describes the process of sending customer, item, sales and return information from Order Administration to Oracle Retail Customer Engagement.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Working with Outbound Interface Transactions (WOIT)

Purpose: Use this option to review triggers in the IL Outbound Trigger table.

Certain actions in Order Administration triggers the system to create IL outbound triggers.

In this topic:

- IL Outbound Triggers
- Work with Outbound Interface Transactions Screen
- Reset All Window

You can create triggers for the following information.

Information	Generated When	See:	File/ Key
stored value card authorization reversals	a cancellation is processed against a stored value card payment or the stored value card payment is deactivated and an open, unused authorization amount exists	Stored Value Card Authorization Reversal	AHR
credit card authorization reversals	the Send reversal field for the service bureau is selected and a cancellation is processed against a credit card payment or the credit card payment is deactivated and an open, unused authorization amount exists	Credit Card Authorization Reversal	AHR

Information	Generated When	See:	File/ Key
ChannelAdvisor shipments	the BILL_ASYNC job processes a shipment for an order whose type matches the ChannelAdvisor Order Type (L90)	ChannelAdvisor Integration Overview	CAS
customers	the Create Generic Customer Download Triggers (L12) system control value is selected	*Generic Customer Download API* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	CST
invoices	the Create Generic Invoice Download Trigger Records (I17) system control value is selected	*Generic Invoice Download API* and Integration with the Sales Audit Module of the Oracle Retail Merchandising Foundation Cloud Service For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	IHD
inventory	the Create Generic Inventory Download Triggers (I32) system control value is selected	*Generic Inventory Download API* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	ITW
pick slips	the Create Generic Pick Download Triggers (I31) system control value is selected	*Generic Pick Out API* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	PCH
purchase orders	the Use WMS Integration (K25) and/or Create Generic PO Download Triggers (K26) and/or Create Generic PO Download Trigger for PO Receipt (K27) system control values are **selected**	*Generic Outbound Purchase Order API* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	POH
return authorizations	the Create Return Download Triggers (K28) system control value is selected		RAD
items/SKUs	the Create Generic Item Download Trigger Records (I15) system control value is selected	*Generic Item Download API* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	SKU
stored value cards	a stored value card item is processed through billing	Stored Value Card Overview and Setup	SVC

Information	Generated When	See:	File/ Key
vendors	the Create Generic Vendor Download Trigger Records (I16) system control value is selected	*Generic Vendor Download API* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).	VND

Mass trigger creation: Additionally, you can create triggers for all item/SKUs, vendors, item warehouses (inventory), and/or invoices using the Generating Outbound Interface Triggers (GOIT) menu option.

Jobs in the Working with Integration Layer Processes (IJCT) menu option monitor the triggers in the IL Outbound Trigger table. At certain intervals the jobs process the triggers and generate a download XML message to send to another system.

Each trigger in the IL Outbound Trigger table contains a File code, indicating the Order Administration table(s) associated with the trigger, the key fields necessary to retrieve the information, and which IL Process job processes the trigger record.

Trigger rules: You can define trigger rules for the following IL Process jobs to determine when the system generates a trigger, based on criteria defined. The record for which you wish to create a trigger must meet the trigger rule criteria in order to create a trigger in the IL Outbound Trigger table; see Defining Outbound Interface Trigger Rules.

Example: If a trigger rule for the Item Outbound job is that the item's Allow SKU field must equal 'Y', the system creates a trigger only for SKU'ed items.

If you generate triggers for:	look at trigger rules for IL Process job:	trigger rules are based on criteria for this table:
customers	Customer Download Outbound	Customer Sold To (Company, Customer class, Inactive?, Country)
item	Item Outbound	Item (INITEM) SKU (INSKU) See *Item Outbound Trigger Rules*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
vendor	Vendor Outbound	Vendor (POVEND) See *Vendor Outbound Trigger Rules*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
invoice	Invoice Outbound	Invoice Header (OEINHD) Order Header (OEORDR) See *Invoice Outbound Trigger Rules*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

If you generate triggers for:	look at trigger rules for IL Process job:	trigger rules are based on criteria for this table:
inventory	Inventory Download	Item (INITEM) Item Warehouse (INIWRE) SKU (INSKU) Warehouse (INWRHS Item UPC (ITMUPC) See *Inventory Download Trigger Rules*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
pick slips	Pick Outbound	Pick Control Header (FLPCTH) See *Pick Out Processing*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
purchase order	Purchase Order Outbound	Purchase Order Header (POH) See *Purchase Order Download Trigger Rules* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
return authorization	Return Authorization Outbound	Order Header (OEORDR)

Note:

Direct table updates are not captured in the IL Outbound Trigger table.

IL Outbound Triggers

This table indicates:

- when the system creates a trigger
- the File code assigned to each trigger created
- the referenced tables, based on the File code
- the key data captured in the Key field
- the IL Process job that processes the trigger.

File code	Created when	Refers to table(s)	Key	IL Process job
AHR	A cancellation is processed against a stored value card or credit card payment or the stored value card or credit card payment is deactivated and an open, unused authorization amount exists.	Auth History SVC Reversal	11122222222333444555 where: **111** is the company code **22222222** is the order number **333** is the order payment method sequence number **444** is the authorization sequence number **555** is the authorization reversal sequence number	SVC_REVRSL (for stored value cards)
CAS	The BILL_ASYNC job processes a shipment for an order whose type matches the ChannelAdvisor Order Type (L90)	Order Header Invoice Header	111222222223333333 where: **111** is the company code **22222222** is the order number **3333333** is the invoice number	N/A (processed by the CASHIP periodic function)
CST	You create, change, or delete a customer	Customer Sold To	11122222222333444555 where: **111** is the company code **222222222** is the customer number	CUST_OUT
IHD	An invoice is created or updated, if the Create Generic Invoice Download Trigger Records (I17) system control value is selected	Invoice Header Order Header	111222222223333333 where: **111** is the company code **22222222** is the order number **3333333** is the invoice number	INVOIC_OUT

File code	Created when	Refers to table(s)	Key	IL Process job
ITW	The item/SKU's availability threshold is breached, if the Create Generic Inventory Download Triggers (I32) system control value is selected, and when you create or maintain a purchase order for the item, if the Include PO Updates (J93) system control value is selected	Item Warehouse	11122222222222333 33333333333 where: **111** is the company code **222222222222** is the item number **33333333333333** is the SKU code	INV_ DOWNLD
PCH	A pick slip is generated, if the Create Generic Pick Download Triggers (I31) system control value is selected	Pick Control Header	1112222222 where: **111** is the company code **2222222** is the pick control number	PICK_OUT
POH	A purchase order outbound trigger is generated, if the Create Generic PO Download Triggers (K26) system control value is selected.	PO Header	1112222222 where: **111** is the company code **2222222** is the purchase order number	PO_OUT
RAD	A return authorization is created, changed, or deleted if the Create Return Download Triggers (K28) system control value is selected	RA Detail	111222222223334445 55 where: **111** is the company code **22222222** is the order number **333** is the ship to number **444** is the return authorization number **555** is the return authorization line number	RETURN_OUT

File code	Created when	Refers to table(s)	Key	IL Process job
SKU	An item or SKU is added, updated or deleted, if the Create Generic Item Download Trigger Records (I15) system control value is selected	Item SKU	11122222222222233333333333 where: **111** is the company code **222222222222** is the item number **33333333333333** is the SKU code	ITEM_OUT
SVC	An order containing a stored value card item that is assigned a number is processed through the Billing Async; see Stored Value Card Purchase and Activation	Stored Value Card	111222222223334444455555 where: **111** is the company code **22222222** is the order number **333** is the ship to number **44444** is the order detail line sequence number **55555** is the stored value card sequence number	SVC_OUT
VND	A vendor is added, updated or deleted, if the Create Generic Vendor Download Trigger Records (I16) system control value is selected	Vendor Vendor Extended	1112222222 where: **111** is the company code **2222222** is the vendor code	VENDOR_ OUT

Work with Outbound Interface Transactions Screen

Purpose: Use this screen to review the triggers in the IL Outbound Trigger table.

How to display this screen: Enter WOIT in the Fast path field or select Work with Outbound Interface Transactions from a menu.

Field	Description
File	A code identifying the Order Administration table(s) containing records you wish to download. This code also indicates which IL Process job processes the trigger record. • AHR = Trigger associated with a stored value card or credit card authorization reversal. The SVC_REVRSL job processes the stored value card triggers. • CAS = Trigger associated with an invoice for a ChannelAdvisor order. The CASHIP periodic function processes these triggers. • CST = Trigger associated with a customer. The CUST_OUT job processes these triggers. • IHD = Trigger associated with an invoice. The INVOIC_OUT job processes these triggers. • ITW = Trigger associated with an item warehouse. The INV_DOWNLD job processes these triggers. • PCH = Trigger associated with a pick slip. The PICK_OUT job processes these triggers. • POH = Trigger associated with an outbound purchase order. The PO_OUT job processes these triggers. • RAD = Trigger associated with a return authorization. The RETURN_OUT job processes these triggers. • SKU = Trigger associated with an item/SKU. The ITEM_OUT job processes these triggers. • SPU = Not currently implemented. • SVC = Trigger associated with a stored value card. The SVC_OUT job processes these triggers. • VND = Trigger associated with a vendor. The VENDOR_OUT job processes these triggers. Example: If you create an item, the system creates an item download trigger in the IL Outbound Trigger table with a File code of SKU, indicating a change has been made to the Item and SKU table and an item download message should be generated. The Key field identifies the particular Order Administration company and data, in this example, item and SKU record, that has been updated. Alphanumeric, 3 positions; optional.
S (status)	The status of the IL outbound trigger. • R (Ready) = Trigger record is ready to be processed. • P (Pending) = Trigger record processing is pending. • X (Processed) = Trigger record has been processed. • E (Error) = Item delete trigger did not process correctly; see *Processing Item Delete Triggers*. • For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). The system purges processed (X) trigger records, based on the setting of the Outbound Interface Trigger File Purge Days (I14) system control value, when you run the PURGIJT periodic function (program name ILR0026) or select the Purge option at this screen. Alphanumeric, 1 position; optional.
Capture date	The date the activity occurred which created the trigger. Numeric, 6 positions (in user date format); optional.
Capture time	The time the activity occurred which created the trigger. Numeric, 6 positions (HH:MM:SS format); display-only.

Field	Description
Orig process date	The date the trigger was originally processed by the system. Blank if the trigger has not yet been processed. Numeric, 6 positions (in user date format); display-only.
Orig process time	The time the trigger was originally processed by the system. Blank if the trigger has not yet been processed. Numeric, 6 positions (HH:MM:SS format); display-only.
Last process date	The date the trigger was last re-processed by the system. You can reprocess a specific trigger by selecting Reset for a trigger. You can reprocess a group of triggers by selecting Reset All. You can only reprocess triggers that are in a pending (P) or processed (X) status. Numeric, 6 positions (in user date format); display-only.
Last process time	The time the trigger was last re-processed by the system. Numeric, 6 positions (HH:MM:SS format); display-only.
From	The name of the program associated with the Order Administration action that created the trigger. Alphanumeric, 8 positions; display-only.
A/C	A code that indicates whether the Order Administration activity represents creation of a new record, a change to an existing record, or a delete of an existing record. • A = a new record was added • C = an existing record was maintained • an existing record was deleted Alphanumeric, 1 position; display-only.
Key	A code used to identify the Order Administration company and data that has been updated. The File field identifies the table where the updated data is located. The Key is then used to identify the record in the table that has been updated. ChannelAdvisor shipment If the file code is CAS, the key is company code + order number + invoice number. For example, 0060000123400000123 indicates the trigger is for company 6, order number 1234, and invoice number 123. Customer If the file code is CST, the key is company code + customer number. For example, 006000013049 indicates the trigger is for company 6, customer 13049. Item/SKU If the file code is SKU, the key is company code + item number + SKU code. For example, 555ABC101020 RED GRLS LRGE indicates the trigger is for company 555, item number ABC101020, and SKU code RED GRLS LRGE. If the item is non-SKU'ed, the SKU code is not part of the key. Invoice If the file code is IHD, the key is company code + order number + invoice number. For example, 5550000596900000495 indicates the trigger is for company 555, order number 5969, and invoice number 495.

Field	Description
	Inventory If the file code is ITW, the key is company code + item number + SKU code, as described above for Item/SKU. Purchase Order Download If the file code is **POH**, the key is company code + purchase order number. For example, 0120000636 indicates the purchase order is from company 12 and the purchase order number is 636. Vendor If the file code is VND, the key is company code + vendor code. For example, 55520002 indicates the trigger is for company 555 and vendor number 20002. Stored Value Card If the file code is SVC, the key is company code + order number + ship to number + order detail sequence number + stored value card sequence number. For example, 55500006676001000010004 indicates the trigger is for company 555, order number 6676, ship to number 1, order detail sequence number 1, and stored value card sequence number 4. Return Authorization Download If the file code is RAD, the key is company code + order number + ship to number + return authorization number + return authorization line number. For example, the Key 00700001446001001001 indicates the return authorization download information is located in company 7 for order number 1446, ship to number 1, return authorization number 1, and return authorization line number 1. Alphanumeric, 30 positions; optional.

Screen Option	Procedure
Delete an IL outbound trigger	Select Delete for a trigger to advance to the Confirm Delete window; select OK to delete it. **Note:** The system allows you to delete any trigger, regardless of whether the status is ready (R) or processed (X).
Reprocess a processed trigger	Select Reset for a trigger to update the status of the trigger from pending (P) or processed (X) to ready (R). The system also updates the Last processed date and Last processed time fields once the trigger is reprocessed. The next time the IL Process job monitors the IL Outbound Trigger table for unprocessed triggers, the job will reprocess the trigger. **Pick triggers associated with a drop ship invoice/pick:** If a PCH trigger is associated with a drop ship invoice/pick, you will not be able to re-send a CWPickOut message for the trigger because the system deletes the pick records immediately after the drop ship forms are generated.
Reprocess a group of triggers	Select Reset All to advance to the Reset All Window.
Purge processed triggers	Select Purge to submit the PURGE_IL job. This job deletes processed (X) trigger records, based on the setting of the Outbound Interface Trigger File Purge Days (I14) system control value. You can also purge records through the PURGIJT periodic function (program name ILR0026).

Reset All Window

Use this window to update the status of a group of triggers from Pending or Processed to Ready.

To reset: Enter the File code, Capture date, and the current Status of the group of triggers you wish to reprocess and select OK.The system changes the status of the group of triggers to Ready.

The next time the IL Process job monitors the IL Outbound Trigger table for unprocessed triggers, the job will reprocess the triggers.

Pick triggers associated with a drop ship invoice/pick: If a PCH trigger is associated with a drop ship invoice/pick, you will not be able to re-send a CWPickOut message for the trigger because the system deletes the pick records immediately after the drop ship forms are generated.

How to display this screen: Select Reset All at the Work with Outbound Interface Transactions Screen.

Field	Description
File code	A code identifying the type of triggers you wish to reprocess. • AHR = Trigger associated with a stored value card or credit card authorization reversal. The SVC_REVRSL job processes the stored value card triggers. • CAS = Trigger associated with a shipment on a ChannelAdvisor order. The CASHIP periodic function processes these triggers. • CST = Trigger associated with a customer. The CUST_OUT job processes these triggers. • IHD = Trigger associated with an invoice. The INVOIC_OUT job processes these triggers. • ITW = Trigger associated with an item warehouse. The INV_DOWNLD job processes these triggers. • PCH = Trigger associated with a pick slip. The PICK_OUT job processes these triggers. • POH = Trigger associated with an outbound purchase order. The PO_OUT job processes these triggers. • RAD = Trigger associated with a return authorization. The RETURN_OUT job processes these triggers. • SKU = Trigger associated with an item/SKU. The ITEM_OUT job processes these triggers. • SPU = Not currently implemented. • SVC = Trigger associated with a stored value card. The SVC_OUT job processes these triggers. • VND = Trigger associated with a vendor. The VENDOR_OUT job processes these triggers. Alphanumeric, 3 positions; required.
Capture date	The date the activity occurred which created the group of triggers you wish to reprocess. Numeric, 6 positions (in user date format); required.

Field	Description
Status	The status of the group of triggers you wish to reprocess. • Ready = Triggers are ready to be processed. Selecting this status does not perform any updates since the group of triggers will already be processed the next time the IL Process job monitors for unprocessed triggers. • Error = Item delete trigger did not process correctly; see *Processing Item Delete Triggers* • Hold = Not currently implemented. • Pending = Trigger processing is pending. • Processed = Triggers have been processed. Select Pending or Processed in this field to change the status of the group of triggers to Ready. The next time the IL Process job monitors the IL Outbound Trigger table for unprocessed triggers, the job will reprocess the triggers. Alphanumeric, 1 position; required. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Generating Outbound Interface Triggers (GOIT)

Purpose: Use this menu option to create triggers in the IL Outbound Trigger table. You have the option to create triggers for:

- item/SKUs (if the Create Generic Item Download Trigger Records (I15) system control value is selected)
- vendors (if the Create Generic Vendor Download Trigger Records (I16) system control value is selected)
- invoices (if the Create Generic Invoice Download Trigger Records (I17) system control value is selected)
- inventory (if the Create Generic Inventory Download Triggers (I32) system control value is selected)

You can use the Working with Outbound Interface Transactions (WOIT) menu option to review the triggers the system generated.

In this topic:

- Trigger Rules
- Processing Sequence of Item Triggers
- Generate Outbound Interface Trigger Screen

Trigger Rules

You can define trigger rules for each IL Process job to determine when the system generates a trigger, based on criteria defined. The record for which you wish to create a trigger must meet the trigger rule criteria in order to create a trigger in the IL Outbound Trigger table; see Defining Outbound Interface Trigger Rules.

If you generate triggers for:	look at trigger rules for IL Process job:	trigger rules are based on criteria for these tables:
item	Item Outbound	Item (INITEM) SKU (INSKU) See *Item Outbound Trigger Rules*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
vendor	Vendor Outbound	Vendor (POVEND) See *Item Outbound Trigger Rules*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
invoice	Invoice Outbound	Invoice Header (OEINHD) Order Header (OEORDR) See *Invoice Outbound Trigger Rules*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
inventory	Inventory Download	Item (INITEM) Item Warehouse (INIWRE) SKU (INSKU) Warehouse (INWRHS Item UPC (ITMUPC) See *Inventory Download Trigger Rules*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Processing Sequence of Item Triggers

The system generates item download triggers alphabetically by item number and SKU code in Kit type sequence. This way all items that are components of any type of kit are processed before the main kit item is processed.

1. The system generates triggers alphabetically by item number and SKU code for all items/ SKUs whose Kit type is blank.
2. The system generates triggers alphabetically by item number and SKU code for all items/ SKUs whose Kit type is F (finished good kit).
3. The system generates triggers alphabetically by item number and SKU code for all items/ SKUs whose Kit type is S (set kit).
4. The system generates triggers alphabetically by item number and SKU code for all items/ SKUs whose Kit type is V (variable set kit).

Example: The system generates item download triggers in the following sequence, based on the item's Kit type.

Item number	Kit type	Sequence
204I	blank	1

Item number	Kit type	Sequence
204J	blank	2
204K	blank	3
204C	F	4
204F	F	5
204B	S	6
204G	S	7
204D	V	8
204E	V	9

Generate Outbound Interface Trigger Screen

Use this screen to define the type of triggers you wish to create in the IL Outbound Trigger table.

How to display this screen: Enter GOIT in the Fast path field or select Generate Outbound Interface Triggers from a menu.

Field	Description
Item	Indicates whether you wish to create triggers in the IL Outbound Trigger table for items/SKUs. • Selected = Generate item/SKU triggers. The system creates a trigger for each SKU in the SKU table that is associated with an item in the Item table and assigns item/SKU triggers a File code of SKU. • Unselected (default) = Do not generate item/SKU triggers. See *Generic Item Download API* for more information on processing item download triggers. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). **Note:** The Create Generic Item Download Trigger Records (I15) system control value must be selected to generate item triggers. **Process sequence:** The system generates item download triggers alphabetically by item number and SKU code in Kit type sequence. This way all items that are components of any type of kit are processed before the main kit item is processed. See Processing Sequence of Item Triggers for an example.

Field	Description
Invoice	Indicates whether you wish to create triggers in the IL Outbound Trigger table for invoices. • Selected = Generate invoice triggers. The system creates a trigger for each invoice in the Invoice Header table and assigns invoice triggers a File code of IHD. • Unselected (default) = Do not generate invoice triggers. See *Generic Invoice Download API* for more information on processing invoice download triggers. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). **Note:** The Create Generic Invoice Download Trigger Records (I17) system control value must be selected to generate invoice triggers.
Vendor	Indicates whether you wish to create triggers in the IL Outbound Trigger table for vendor information. • Selected = Generate vendor triggers. The system creates a trigger for each vendor in the Vendor table and assigns vendor triggers a File code of VND. • Unselected (default) = Do not generate vendor triggers. See *Generic Vendor Download API* for more information on processing vendor download triggers. **Note:** The Create Generic Vendor Download Trigger Records (I16) system control value must be selected to generate vendor triggers. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Inventory	Indicates whether you wish to create triggers in the IL Outbound Trigger table for inventory information. • Selected = Generate inventory triggers. The system creates a trigger for each SKU in the Item Warehouse table and assigns inventory triggers a File code of ITW. If the Include Non-Allocatable Warehouses (I34) system control value is unselected, the system creates a trigger record for an item only if it has an Item Warehouse record in an allocatable warehouse. • Unselected (default) = Do not generate inventory triggers. See *Generic Inventory Download API* for more information on processing inventory download triggers. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). **Note:** The Create Generic Inventory Download Triggers (I32) system control value must be selected to generate inventory triggers.

Completing this screen:

1. Select the triggers you would like to generate.
2. Select OK to validate your selection.
3. Select Submit to submit the triggers.

The system submits the:

- ITMDWNLD job to generate item triggers; see *Generic Item Download API*.

- INVDWNLD job to generate invoice triggers; see *Generic Invoice Download API*.
- VNDDWNLD job to generate vendor triggers; see *Generic Vendor Download API*.
- INVENDL job to generate inventory triggers; see *Generic Inventory Download API*.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Screen Option	Procedure
Submit the generation of IL outbound triggers	Select Submit. The system submits the: • ITMDWNLD job to generate item triggers; see *Generic Item Download API*. • INVDWNLD job to generate invoice triggers; see *Generic Invoice Download API*. • VNDDWNLD job to generate vendor triggers; see *Generic Vendor Download API*. • INVENDL job to generate inventory triggers; see *Generic Inventory Download API*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Work with Store Cross Reference (WSCR)

Purpose: Use this screen to set up cross-reference information between a store location and Order Administration. This information can be used to:

- display a description of the store location assigned to fulfill a brokered backorder. See the Work with Order Broker Screen for an example, and see Brokered Backorders for background.
- enable the customer to select a store location for pickup of a ship-for-pickup order at the Store Location Screen, or for a store pickup order at the Store Pickup Search Results Screen. When the customer selects the store, the store's shipping address defaults to the order. See Ship-for-Pickup Orders and Store Pickup Orders for background.
- indicate the source code to default to a retail pickup or delivery order. See Retail Pickup (including Ship-for-Pickup) or Delivery Orders for background.
- display a description of an Order Administration warehouse at the Work with Order Broker Screen when it is assigned to fulfill a retail pickup or delivery order. See Retail Pickup (including Ship-for-Pickup) or Delivery Orders for background.
- display a description of an Order Administration warehouse at the Work with Order Broker Screen for a ship-for-pickup order. See Ship-for-Pickup Orders for background.
- provide default information for your unique POSLog extract. See the Default Location for ORCE Integration (K69) system control value for more information.
- provide the pickup location displayed in the store pickup notification email. See Store Pickup Confirmation Email Program (L48) for more information.
- provide the store name, address, and phone number to include in the *OriginatingStore* element of the *Outbound Email XML Message (CWEmailOut)* for:

- a retail pickup, delivery, ship-for-pickup, or store pickup order; or,
- for a sales rep's Home store, if it is flagged as active, or for the Originating store from the Order Header table

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

> **Note:**
>
> The Store Cross Reference record is not used:

- as part of the Merchandise Locator API.
- to display store descriptions or addresses at the Store Pickup Search Results Screen, although the Store Cross Reference record defaults to the Order Ship To Address when you accept the order.

Other ways to create store cross references: You can also create records in the Store Cross Reference table by:

- uploading them from an external system: see Store Upload for instructions. Using this option, you can also update existing records.
- importing them from Order Orchestration through a web service: see Importing Store Cross Reference Locations through Order Orchestration's Discovery Web Service for more information. Using this option, you can create records, but cannot update them.

In this topic:

- Work with Store Cross Reference Screen
- Create Store Cross Reference Screen

Work with Store Cross Reference Screen

How to display this screen: Enter WSCR in the Fast path field at the top of any menu or select Work with Store Cross Reference from a menu.

When you first advance to this screen, stores display in ascending store code sequence.

Column sort: You can sort on any column on this screen by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Field	Description
Store	A code identifying an external store location. Can also act as a cross-reference to an Order Administration warehouse. Enter a full or partial store code to display stores that begin with your entry. Alphanumeric, 10 positions.

Field	Description
Description	The description of the store location or warehouse. This description is displayed in Working with Order Broker (WOBR) as the name of the store assigned to fulfill a brokered backorder, or the description of the warehouse assigned to fulfill a retail pickup or delivery order or that is shipping a ship-for-pickup order; also, it defaults to the Company field at the Create One Time Ship To Address Screen when you select this store location at the Store Location Screen for a ship-for-pickup order. See the Order Orchestration Integration for a discussion. Enter a full or partial description to display stores that contain your entry. Alphanumeric, 40 positions.

Option	Procedure
Create a store cross reference	Select Create for a store cross reference to advance to the Create Store Cross Reference Screen. **Note:** You can also use the Importing Store Cross Reference Locations through Order Orchestration's Discovery Web Service process or the Store Upload to create store cross reference records.
Change a store cross reference	Select Change for a store cross reference to advance to the Change Store Cross Reference screen. See the Create Store Cross Reference Screen for field descriptions.
Display a store cross reference	Select Display for a store cross reference to advance to the Display Store Cross Reference screen. You cannot change any information on this screen. See the Create Store Cross Reference Screen for field descriptions.
Delete a store cross reference	Select Delete for a store cross reference. At the Confirm Delete window, select Yes to delete the record; otherwis

Create Store Cross Reference Screen

Purpose: Use this screen to enter store cross-reference information for:

- transferring invoice data or sales transactions to your unique POSLog integration.
- integration with Order Orchestration; see the Order Orchestration Integration for background.

> **Note:**
>
> You can also use the Importing Store Cross Reference Locations through Order Orchestration's Discovery Web Service process or the Store Upload to create store cross reference records.

How to display this screen: Select **Create** at the Work with Store Cross Reference Screen.

Field	Description
Store #	A code identifying an external store location. Can also act as a cross-reference to an Order Administration warehouse. Used in certain integrations: • POSLog: Set the Default Location for ORCE Integration (K69) t to the store number representing Order Administration. • Order Orchestration: Set up a cross-reference for each store location to send retail pickup or delivery orders to Order Administration, or where you will send ship-for-pickup or pickup orders from Order Administration. Also, set up a cross-reference record for each Order Administration warehouse that you integrate with Order Orchestration if you would like to display the related description at the Work with Order Broker Screen. Alphanumeric, 10 positions. Create screen: required. Change screen: display-only.
Phone Number	The phone number for the store. Included in the *OriginatingStore* element of the *Outbound Email XML Message (CWEmailOut)*; see the *OriginatingStore* in the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1) element for more information. Alphanumeric, 14 positions; optional.
Description	The description to: • display in Working with Order Broker (WOBR) as the name of the store assigned to fulfill a brokered backorder. See Brokered Backorders for a discussion. • display as the fulfilling location for the warehouse assigned to fulfill a retail pickup or delivery order. See Retail Pickup (including Ship-for-Pickup) or Delivery Orders. • display as the fulfilling location for the warehouse shipping a ship-for-pickup order. See Ship-for-Pickup Orders. • default to the Company field at the Create One Time Ship To Address Screen when you select this store location at the Store Location Screen for a ship-for-pickup order. See Ship-for-Pickup Orders for a discussion. • identify Order Administration in your POSLog integration. • include in the *OriginatingStore* element of the *Outbound Email XML Message (CWEmailOut)*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). **Note:** If the description exceeds 30 positions, it is truncated at the Store Location Screen and at the Create One Time Ship To Address Screen. Also, any additional characters do not print on the pick slip and are not sent to Order Orchestration. Alphanumeric, 40 positions. Create screen: required. Change screen: optional.

Field	Description
Active?	Defines whether the store location is active. • Selected = The store location is active. • Unselected = The store location is not active. The system validates that the store location is active when you define the store on the Work with Order Ship to Properties Screen in Order Entry or receive an order through the *Generic Order Interface (Order API)* that specifies a sales_rep_store location. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
System Code	The system associated with the store location in Order Orchestration. Used to identify the fulfilling location when sending a SubmitOrder request to Order Orchestration for a store pickup or ship-for-pickup order, and acts as an override to the Name in OROB for Point of Sale (L09). If this field is: • blank, the Name in OROB for Point of Sale (L09) is used instead • not a valid system code in Order Orchestration that is associated with the selected location, Order Orchestration cannot create the order, and returns an error Your entry must be a valid system code associated with the fulfilling location in Order Orchestration and the case must match exactly. Used only for store pickup and ship-for-pickup orders. **Note:** You still need to complete the Name in OROB for Point of Sale (L09) system control value, or you cannot create a ship-for-pickup order even if a valid system code is specified here.
Register #	The register number for transactions to pass to the point-of- sale (POS) system as part of a POSLog integration. Numeric, 3 positions; optional.
Employee ID	The employee identification to pass to the POS system as part of a POSLog integration. Alphanumeric, 12 positions; optional.
Discount Code	The discount code used to pass discount information for items to the POS system as part of a POSLog integration. Alphanumeric, 12 positions; optional.
Price Override Code	The price override reason code used as a cross reference as part of a POSLog integration. Not validated against the Price Override Reason Code table. Alphanumeric, 3 positions, optional.
Item Hierarchy Level 1-4	Optionally, select the level of the item hierarchy in Order Administration that matches to the hierarchy level in an external system. Possible settings: • L/S (Long SKU) Division • L/S Department • L/S Class • Item Class • Item Category Optional.

Field	Description
Ship for Pickup	Indicates whether the store location is available for selection as a destination for a ship-for-pickup order. Only store locations that have this field selected are listed at the Store Location Screen in order entry. See Ship-for-Pickup Orders for an overview. If you select this field, the system validates that you enter: • the first Address line • a valid Country code • a valid State for the Country if state is required for the country • a Postal code that starts with a valid SCF for the State if postal code is required for the country **Note:** Select this field only for stores whose Ship For Pickup Receiving/Pickup Available setting is selected in Order Orchestration.
Source Code	The source code to assign to retail pickup or delivery orders received from Order Orchestration. Used as follows for orders created through the fulfillments response message based on whether the order originated in Order Administration: • If the order did originate in Order Administration: • Use the Order Broker Source Code (K93), if specified; otherwise, if this system control value is blank, • Use the source code, if any, specified for the store cross reference record for the originating location, which is based on the Originating Location to Pass to OROB (M32) system control value; otherwise, • Use the source code passed in the fulfillments response message from Order Orchestration, which would be from the originating order. • If the order did not originate in Order Administration: • Use the source code, if any, passed in the fulfillments response message from Order Orchestration; otherwise, • Use the source code, if any, specified for the store cross reference record for the originating location; otherwise, • Use the Order Broker Source Code (K93), if specified; otherwise, if this system control value is blank, • The order is created in error status because of the missing source code. See e Retail Pickup (including Ship-for-Pickup) or Delivery Orders for an overview. Your entry must be an existing source code. See Working with Source Codes (WSRC) for more information. Alphanumeric, 9 positions; optional.
OriginatingStore element in the CWEmailOut message	The following address fields, plus the Phone Number, are included in the *OriginatingStore* element of the *Outbound Email XML Message (CWEmailOut)*. See the *OriginatingStore* for more information. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Address	The address to default to the Address fields at the Create One Time Ship To Address Screen when you select this store location at the Store Location Screen for a ship-for-pickup order. See Ship-for-Pickup Orders for a discussion. Alphanumeric, four 32-position fields; optional.

Field	Description
City	The address to default to the Address fields at the Create One Time Ship To Address Screen when you select this store location at the Store Location Screen for a ship-for-pickup order. See Ship-for-Pickup Orders for a discussion. Alphanumeric, four 32-position fields; optional.
State	The state to default to the Create One Time Ship To Address Screen when you select this store location at the Store Location Screen for a ship-for-pickup order. See Ship-for-Pickup Orders for a discussion. Required only if the Ship for Pickup flag is selected, and if the Require state? flag is selected for the country (see Setting Up the Country Table (WCTY)). Alphanumeric, 2 positions; required if you select the Ship for Pickup flag; otherwise, optional.
Postal code	The postal or zip code to default to the Postal code field at the Create One Time Ship To Address Screen when you select this store location at the Store Location Screen for a ship-for-pickup order. See Ship-for-Pickup Orders for a discussion. Required only if the Require postal code? flag is selected for the country (see Setting Up the Country Table (WCTY)) and if the Ship for Pickup flag is selected for the store cross reference. If a postal code is required, it is validated against the Zip/City/State (Postal Code) table; see Setting Up the Zip/City/State (Postal Code) Table (WZIP). Alphanumeric, 10 positions; required if you select the Ship for Pickup flag; otherwise, optional.
Country	The country code to default to the Country field at the Create One Time Ship To Address Screen when you select this store location at the Store Location Screen for a ship-for-pickup order. See Ship-for-Pickup Orders for a discussion. If the Ship for Pickup flag is selected, you need to enter a valid country code. The Default Country for Customer Address (B17) defaults. Alphanumeric, 3 positions; required if you select the Ship for Pickup flag; otherwise, optional.

Order Orchestration Integration

Topics in this part: This part describes integration between Order Administration and Order Orchestration.

- Order Orchestration Integration Overview describes the components of the integration between Order Orchestration and Order Administration, including the extract processes that occur automatically as well as the Order Orchestration and Merchandise Locator API's, and describes required setup.
- Order Orchestration Integration provides details on how the integration with Order Orchestration handles each order type.
- Merchandise Locator API describes how to search for a store location where the customer can pick up an item.

Working with Order Broker (WOBR)

Purpose: Use this menu option to review the records and history of all order lines sent to or received from Order Orchestration for shipment or customer pickup. You can also use this menu option to cancel fulfillment of a brokered backorder request to Order Orchestration and leave the order line open, so you can fulfill it from your warehouse using your standard process.

Determining the Order Orchestration type: A *Delivery type* of retail pickup, delivery, store pickup, or ship-for-pickup is indicated on the Display Order Broker Screen. The *Delivery type* at this screen is blank for a brokered backorder. This screen is available by selecting Display for an Order Orchestration record at the Work with Order Broker screen.

Both originating and fulfilling orders listed: If the Use OROB for Fulfillment Assignment (M31) system control value is selected, both the originating order submitted to Order Orchestration and the fulfilling order assigned in Order Administration to fulfill it are included in these totals.

Example: Order 12345 was submitted to Order Orchestration for assignment, and Order Orchestration submitted the order to Order Administration to fulfill from the warehouse. Order Administration created order 12346 to fulfill order 12345. Lines from both order 12345 and 12346 are listed with their respective statuses.

For more information: See the Order Orchestration Integration for an overview.

In this topic:

- Work with Order Broker Screen
- Display Order Broker Screen
- Display Order Orchestration History Screen
- Canceling a Brokered Backorder Request
- Confirm Order Orchestration Cancel Window
- Printing the Order Orchestration Aging Report
  – Print Aging Report Window
  – Order Orchestration Aging Report

Work with Order Broker Screen

How to display this screen: Enter WOBR in the *Fast path* field at the top of any menu, or select Work with Order Broker from a menu.

Column sort: You can sort on any column except *Line #* on this screen by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

When you first advance to this screen, Order Orchestration records display in ascending create date, order number sequence.

Field	Description
Status	The current status of the Order Orchestration request. Possible statuses are described at the Order Orchestration Status Summary Table. Search: Select a status and select OK to display Order Orchestration records that match your entry.
Create date	The date when the Order Orchestration request was created. *Search: Enter a date and select OK to display Order Orchestration records that match your entry.* *Numeric, 6 positions (user date format); optional.*
Order #	The order number and ship-to number that originated a brokered backorder, store pickup, or ship-for-pickup order, or was created as a result of a retail pickup or delivery request. The ship-to number is set to 1 if there is a single shipping address. **Note:** Ship-for-pickup orders are not listed here until you generate a pick slip and Order Administration submits the order to Order Orchestration. Search: Enter an order number and select OK to display Order Orchestration records that match your entry. *Order number: numeric, 8 positions; optional.* *Ship-to number: numeric, 3 positions; optional.*
Line #	The sequence number in the Order Detail table that identifies the order line to be fulfilled through the Order Orchestration integration. The sequence number might differ from the order line number displayed in order maintenance or order inquiry if, for example, you deleted one of the previous lines on the order. *Numeric, 5 positions; optional.*
Item/SKU	The item to be fulfilled through Order Orchestration. If the item has SKU's, the SKU code also displays. Search: Enter a valid item number and select OK to display Order Orchestration records that contain your entry. If the item has SKU's, you can search on item number only. *Alphanumeric, 12 positions; optional.*
Qty	The current quantity to be fulfilled at the *Fulfilling location*. Displayed regardless of status. *Numeric, 5 positions; display-only.*
Fulfilling location	See the Order Orchestration Originating Location, Fulfilling Location, and Pickup Location for a discussion. Search: Enter a full or partial fulfilling location code and select OK to display Order Orchestration records that contain your entry. *Alphanumeric, 50 positions; optional.*

Field	Description
Request ID	A unique ID number assigned by Order Orchestration to identify the order. If the Use Split Order (L56) system control value is: • unselected: each individual brokered backorder item submitted to Order Orchestration receives a unique request ID, and Order Orchestration treats it as a separate order. • selected: Order Administration sends a single submit order request for all backordered lines that are eligible for brokering. The Use Split Order (L56) system control value does not affect how Order Administration creates or processes ship-for-pickup, retail pickup, delivery, or store pickup orders. The request ID is blank for requests whose status is: • **Z: Canceled** • **C: Closed** • **J: Rejected** • **R: Ready** • **W: Waiting** The field might also be blank for requests in E (Error) status, depending on the nature of the error. For example, requests that Order Orchestration did not receive and create successfully are not assigned request ID's. Although the field in Order Administration is up to 25 positions, Order Orchestration does not support a request ID longer than 10 positions. Search: Enter a valid request ID and select OK to display Order Orchestration records that match your entry. *Numeric, 25 positions; optional.*

Option	Procedure
Display details of an Order Orchestration request	In the *Action* field, select Display to advance to the Display Order Broker Screen.
Review history for an Order Orchestration request	In the *Action* field, select History to advance to the Display Order Orchestration History Screen.

Option	Procedure
Cancel an Order Orchestration request	In the *Action* field, select Cancel to cancel a brokered backorder and return the order line to standard backorder processing. See Canceling a Brokered Backorder Request for more information. **Note:** • To cancel both the Order Orchestration request and the order line itself, use the cancel option in order maintenance. See the discussion under Canceling a Brokered Backorder Request for background. • The Cancel option is available only for brokered backorders, only if you have authority under the Cancel Order Broker Lines (B19) secured feature, and only if the Order Orchestration request is in a status eligible for cancellation (not closed, shipped, canceled, cancel pending, unfulfillable or error).
Print the Order Orchestration Aging Report	Select Print to advance to the Print Aging Report Window. See Printing the Order Orchestration Aging Report for more information.

Display Order Broker Screen

Purpose: Use this screen to review details about an Order Orchestration request.

How to display this screen: Select Display in the *Action* field for a record at the Work with Order Broker Screen.

Field	Description
Order #	The order number that originated the brokered backorder, store pickup, or ship-for-pickup, or that was created as a result of the retail pickup or delivery request. The order number is separated from the ship-to number by a hyphen. *Numeric, 8 positions; display-only.*
Ship To #	The order ship to number that originated the brokered backorder, store pickup, or ship-for-pickup, or that was created as a result of the retail pickup or delivery request. The order number is separated from the ship-to number by a hyphen. *Numeric, 3 positions; display-only.*

Field	Description
Line #	The sequence number in the Order Detail table that identifies the order line to be fulfilled through the Order Orchestration integration. The sequence number might differ from the order line number displayed in order maintenance or order inquiry if, for example, you deleted or canceled one of the previous lines on the order. *Numeric, 5 positions; display-only.*
Item/SKU	The item and SKU fulfilled through the Order Orchestration integration. *Item: alphanumeric, 12 positions; display-only.* *SKU: alphanumeric, three 4-position fields; display-only.*
Description	A description of the item. If the item has SKUs, the SKU description displays. *Alphanumeric, 120 positions (item) or 40 positions (SKU); display-only.*
Order qty	The ordered quantity for the order detail line. This field is used for all order types. *Numeric, 5 positions; display-only.*
Qty	The quantity of a brokered backorder line that is currently assigned to Order Orchestration for fulfillment, or has been fulfilled or canceled. Might be less than the ordered quantity if this is a brokered backorder, the Use Split Order (L56) system control value is selected, and *the Allow Split Order* and *Allow Split Line* preferences in Order Orchestration are also selected. See the Use Split Order (L56) system control value for a discussion. *Numeric, 5 positions; display-only.*
Status	The current status of the Order Orchestration request. The description is to the right. Possible statuses are described at the Order Orchestration Status Summary Table. *Alphanumeric, 1 position; display-only.*
Create date	The date when the Order Orchestration request was created. *Numeric, 6 positions (user date format); display-only.*
Create time	The time when the Order Orchestration request was created. *Numeric, 6 positions (HH:MM:SS format); display-only.*
Last request date	The last date when Order Administration sent an order or status request to Order Orchestration. *Numeric, 6 positions (user date format); display-only.*
Last request time	The last time when Order Administration sent an order or status request to Order Orchestration. *Numeric, 6 positions (HH:MM:SS format); display-only.*

Field	Description
Request ID	A unique ID number assigned by Order Orchestration to identify the order. If the Use Split Order (L56) system control value is: • unselected: each individual brokered backorder item submitted to Order Orchestration receives a unique request ID, and Order Orchestration treats it as a separate order. • selected: Order Administration sends a single submit order request for all backordered lines that are eligible for brokering. The request ID is blank for requests whose status is: • **Z: Canceled** • **C: Closed** • **J: Rejected** • **R: Ready** • **W: Waiting** The field might also be blank for requests in E: Error status, depending on the nature of the error. For example, requests that Order Orchestration did not receive and create successfully are not assigned request ID's. *Numeric, 30 positions; display-only.*
Originating location	See the Order Orchestration Originating Location, Fulfilling Location, and Pickup Location for a discussion. *Alphanumeric, 50 positions; optional.*
Fulfilling location	See the Order Orchestration Originating Location, Fulfilling Location, and Pickup Location for a discussion. *Alphanumeric, 50 positions; optional.*
Pickup location	See the Order Orchestration Originating Location, Fulfilling Location, and Pickup Location for a discussion. *Alphanumeric, 50 positions; optional.*
Broker delivery type	The type of order: • blank = brokered backorder. See Brokered Backorders. • D - DELIVERY = See Retail Pickup (including Ship-for-Pickup) or Delivery Orders. • P - STORE PICKUP = See Store Pickup Orders. • R - RETAIL PICKUP = See Retail Pickup (including Ship-for-Pickup) or Delivery Orders. • S - SHIP FOR PICKUP = See Store Pickup Orders.

Option	Procedure
Review history for the Order Orchestration request	Select History to advance to the Display Order Orchestration History Screen.

Display Order Orchestration History Screen

Purpose: Use this screen to review the order, status, and cancel requests sent from Order Administration to Order Orchestration, and the responses received. History is listed in chronological order (oldest to newest).

Not included in this history:

- Fulfillments request and response messages
- SubmitOrder request and response messages for store pickup or ship-for-pickup orders
- Changes to a brokered backorder's *Under Review* flag that can occur if the Send Held Orders to OROB (M18) system control value is selected

How to display this screen: Select History in the *Action* field for a record at the Work with Order Broker Screen, or select History at the Display Order Broker Screen.

Field	Description
Order #	The order number and ship-to number related to the Order Orchestration request. The order number is separated from the ship-to number by a hyphen. *Order number: numeric, 8 positions; display-only.* *Ship-to number: numeric, 3 positions; display-only.*
Line #	The sequence number in the Order Detail table that identifies the order line to be fulfilled through the Order Orchestration integration. The sequence number might differ from the order line number displayed in order maintenance or order inquiry if, for example, you deleted or canceled one of the previous lines on the order. *Numeric, 5 positions; display-only.*
Item/SKU	The item and SKU to be fulfilled through the Order Orchestration integration. *Item: alphanumeric, 12 positions; display-only.* *SKU: alphanumeric, three 4-position fields; display-only.*
Item/SKU description (unlabeled field to the right of the Item/SKU)	The description of the item and SKU. This field displays up to 52 positions; however, if the SKU description is truncated, you can display the rest by putting your cursor in the field and advancing it to the right. *Item description: alphanumeric, 120 positions; display-only.* *SKU description: alphanumeric, 40 positions; display-only.*
Order qty	The ordered quantity for the order detail line. This field is used for all order types. *Numeric, 5 positions; display-only.*
Originating Location	See Order Orchestration Originating Location, Fulfilling Location, and Pickup Location for a discussion. *Alphanumeric, 50 positions; optional.*
Pickup Location	See Order Orchestration Originating Location, Fulfilling Location, and Pickup Location for a discussion. *Alphanumeric, 50 positions; optional.*
For each Order Orchestration History record:	

Field	Description
Date/Time	The date and time when the request was sent to Order Orchestration, or when the response was received in Order Administration. There might be a difference between the time of the Send Status Request and Receive Status Response activities, because the status list request can include up to 1000 records, resulting in a delay between generating the request and processing the response for an individual order line. *Date: numeric, 6 positions (user date format); display-only.* *Time: numeric, 6 positions (HH:MM:SS format); display-only.*
Transaction type	The type of activity that occurred. Possible transaction types are: A - Send Order Request = Order Administration sent the initial submit order message to Order Orchestration (brokered backorders). B - Receive Order Response = Order Administration received the order response message from Order Orchestration (brokered backorders). C - Send Status Request = Order Administration sent an request to Order Orchestration to inquire about the order's current status. D - Receive Status Response = Order Administration received the status inquiry response message from Order Orchestration. M - Maintenance Transaction = You canceled the brokered backorder or store pickup request. You can cancel a brokered backorder either through order maintenance, or by canceling the Order Orchestration request itself (but not the order line) at the Work with Order Broker Screen; however, you can only cancel a store pickup request through order maintenance. E - Send Update Request = Order Administration sent a status update request message to Order Orchestration. F - Receive Update Response = Order Administration received the status update response message from Order Orchestration. See Sample Order Orchestration Messages for examples of the different messages generated or received by Order Administration as part of the Order Orchestration integration. *Alphanumeric, 25 positions; display-only.*
Status	The current status of the Order Orchestration request. The description is to the right. Possible statuses are described at the Order Orchestration Status Summary Table. *Alphanumeric, 1 position; display-only.*
Fulfilling location	See the Order Orchestration Originating Location, Fulfilling Location, and Pickup Location for a discussion. *Alphanumeric, 50 positions; optional.*
Qty	The quantity of the Order Orchestration line at the time of the activity. Might be less than the ordered quantity if this is a brokered backorder, the Use Split Order (L56) system control value is selected, and the *Allow Split Order* and *Allow Split Line* preferences in Order Orchestration are also selected. See the Use Split Order (L56) system control value for a discussion. *Numeric, 5 positions; display-only.*

Field	Description
OROB Ln #	The sequence number in the Order Detail table that identifies the order line to be fulfilled through the Order Orchestration integration. The sequence number might differ from the order line number displayed in order maintenance or order inquiry if, for example, you deleted or canceled one of the previous lines on the order. *Numeric, 5 positions; display-only.*
Error	The error, if any, received from Order Orchestration. The error message is truncated if it exceeds 30 positions. An error of `Null response from OROB` indicates that the OROB Account (K49) system control value is not set correctly. See Troubleshooting the Order Orchestration Integration and the Order Orchestration Operations Guide for more information on possible errors. *Alphanumeric, 30 positions; display-only.*

Canceling a Brokered Backorder Request

Overview: Your options in canceling a brokered backorder request in Order Administration are:

Cancel the brokered backorder request and reassign fulfillment: to return the order line to standard backorder and fulfillment processing in Order Administration, use the cancel option from the Work with Order Broker Screen.

Cancel both the brokered backorder request and the order line itself: to prevent the order line from shipping to the customer, use the:

- Cancel option at the Work with Order Lines Screen for an order line: cancels just the selected order line. If you enter a different cancel quantity at the Enter Cancel Reason Window, any remaining uncanceled quantity returns to standard backorder and warehouse processing in Order Administration.
- Cancel Order option at the Work with Order Screen in Order Maintenance or Work with Order Lines Screen: cancels the entire order.

> **Important:**
>
> - Before canceling a brokered backorder request, it is important to confirm that the assigned fulfilling location is not in the process of shipping it. Even if the current status in Order Administration indicates that the order is not in the process of fulfillment, depending on the setting of the *Order Broker Status Update Interval (K10)* this information could be out of date.
> - If the Use OROB for Fulfillment Assignment (M31) system control value is selected you can cancel the delivery order that was created to fulfill the originating broker backorder. In this situation, the system changes the Order Orchestration record's status to Canceled and sends a status inquiry request to Order Orchestration. See Canceling an Item in Order Maintenance for more information.
> - If you broker ship-for-pickup orders for fulfillment assignment (the Use OROB for Ship for Pickup Fulfillment Assignment (M34) system control value is set to ALWAYS and the Send B/O to OROB (K08) system control value is selected), when you cancel a ship-for-pickup order, the system sends an update to Order Orchestration so that the order can be updated to canceled. In addition, if a retail pickup order was created in Order Administration to fulfill the ship-for-pickup order, when you run pick slip generation for the retail pickup order, the system does not generate a pick slip and assigns the hold reason defined in the Order Broker Hold Reason (Cancel) (L02) system control value to the order. The system also writes an order transaction history message for the retail pickup order: `Order held - line(s) canceled in Order Orchestration.`

Secured feature: The Cancel Order Broker Lines (B19) secured feature controls the authority to cancel a brokered backorder. If you do not have authority under this secured feature:

- the Cancel option is not available at the Work with Order Broker Screen
- you cannot cancel a brokered backorder line in order maintenance
- if you select the Cancel Order option in order maintenance, Order Administration does not cancel any brokered backordered lines and displays an error message: `Not authorized to cancel Order Broker line.`

> **Note:**
>
> You cannot use the e-commerce cancel request message to cancel a backordered line assigned to Order Orchestration. See E-Commerce Cancel Process for background.

Confirm Order Orchestration Cancel Window

How to display this window: Select Cancel for:

- an Order Orchestration request at the Work with Order Broker Screen
- in order maintenance:

  - a backordered order line assigned to Order Orchestration
  - an order that includes a backordered order line assigned to Order Orchestration

Cancel option available? The Cancel option is available only if you have authority under the Cancel Order Orchestration Lines (B19) secured feature and if the Order Orchestration request has not already been shipped or submitted for cancellation, it is not in error, and Order Orchestration has not indicated that it is unfulfillable.

Field	Description
Status	The current status of the Order Orchestration request. A brokered backorder request is eligible for cancellation only if its status is: • A - Accepted = The assigned fulfilling location has accepted the order. • K - Acknowledged = Order Orchestration has received the order request, assigned a request ID, selected a fulfilling location, and created the order in its database. • P - Polled = The assigned fulfilling the location has polled Order Orchestration for new orders and been notified of this order. • R - Ready = The request is ready to be sent to Order Orchestration, but the BROKER process has not yet generated the request message. • W - Waiting = The order request message has been sent to Order Orchestration, but Order Administration has not yet received the response.
Item/SKU	The backordered item and SKU to be fulfilled through Order Orchestration. *Item: alphanumeric, 12 positions; display-only.* *SKU: alphanumeric, three 4-position fields; display-only.*
Fulfilling location	The code identifying the store location assigned to fulfill the backorder. In the case of a retail pickup or delivery order, this is the Order Administration warehouse. See the Order Orchestration Originating Location, Fulfilling Location, and Pickup Location for a discussion. *Alphanumeric, 50 positions; optional.*

Completing this screen: Click OK to submit.

Updates at accept: When you confirm the cancellation:

- An Order Orchestration History message tracks the activity. The *Transaction type* is M - Maintenance Transaction.
- The order detail line is updated immediately. If you cancel the Order Orchestration request but not the order line itself, the *Drop ship* flag and *Printed quantity* are cleared, and the order line returns to standard backorder processing.
- **Order Orchestration status change:**
  - *If the order has not yet been sent to Order Orchestration* (the status of the Order Orchestration request is R (ready), the status of the Order Orchestration request changes to C (closed). No further updates take place.
  - *If the order has been sent to Order Orchestration* (the status of the Order Orchestration request is W (waiting), K (acknowledged), P (polled), or A (accepted): the status of the Order Orchestration request changes to Y (pending cancel). Once the BROKER job receives confirmation of the cancellation from Order Orchestration,

it changes the status of the Order Orchestration request to Z (canceled), and writes an Order Transaction History message (for example, `Ln#: 2 Cancel Acknowledged by Broker`).

Status update message: The status update message includes the cancel reason code and description. See the Order Status Update Cancel Request Message Sample (Brokered Backorder or Store Pickup) for information about the fields submitted to Order Orchestration for the cancellation of a brokered backorder.

Printing the Order Orchestration Aging Report

Purpose: Use the Order Orchestration Aging Report to review order lines that have been assigned to Order Orchestration for fulfillment.

Print Aging Report Window

How to display this window: Select Print at the Work with Order Broker Screen.

Field	Description
Status	Optionally, select a status to include Order Orchestration records that are currently in this status, or leave this field unselected to include records regardless of status. Statuses that are eligible for selection are: • A (Accepted) = Brokered backorder or store pickup: The location assigned to fulfill the order has accepted it. • F (Picking) = Retail pickup, delivery, or ship-for-pickup: The pick slip has been printed. (Status in Order Orchestration is *New_Order* or *Picked*). • G (Resend Fulfilled) = Delivery: The Order Status Update request message to change the status in Order Orchestration to fulfilled did not generate a response message from Order Orchestration, possibly because message authentication failed or communication is down. In this case, the BROKER_ORD job re-sends the Order Status Update request the next time it runs. • H (Resend Intransit) = Ship-for-pickup: The Order Status Update request message to change the status in Order Orchestration to intransit did not generate a response message from Order Orchestration, possibly because message authentication failed or communication is down. In this case, the BROKER_ORD job re-sends the Order Status Update request the next time it runs. • I (In Process) = Retail pickup or delivery: The order was received from Order Orchestration and created without error. (Status in Order Orchestration is *Accepted*.) • J (Rejected) = – Retail pickup or delivery: The order was sold out after creation in Order Administration. – Store pickup: The selected store location has rejected the order. • K (Acknowledged) = Brokered backorder or store pickup: Order Orchestration has received the order request, assigned a request ID, selected a fulfilling location, and created the order in its database. (Status in Order Orchestration is *New_Order*.) • L (Partial Fulfill) = Retail pickup, ship-for-pickup, or store pickup: The customer has picked up one or more items on the order, but not the complete order. (Status in Order Orchestration is *Partially Fulfilled*.) • N (New) = Retail pickup or delivery: The order was received from Order Orchestration but is in error. (Status in Order Orchestration is *Polled*.) • O (Posted) = Brokered backorder, store pickup, or ship-for-pickup: Order Orchestration has submitted the order or order line for enterprise fulfillment. See Enterprise Order Integration (Future Receipts and Active PO/Pre-Order Processing) for background. • P (Polled) = Brokered backorder or store pickup: The assigned fulfilling location has polled Order Orchestration for new orders and been notified of this order. (Status in Order Orchestration is *Polled*.) • R (Ready) =

Field	Description
	– Brokered backorder: The request is ready to be sent to Order Orchestration, but the BROKER process has not yet generated the request message. – Store pickup: Order Administration attempted to send the order to Order Orchestration, but Order Orchestration has not responded. In this case, Order Administration retains the order information in the Store Pickup tables until communication with Order Orchestration resumes. • S (Received by Store) = Retail pickup or ship-for-pickup: The order has been received by the store location but not yet picked up by the customer. (Status in Order Orchestration is *Received*.) • T (In Transit) = Retail pickup or ship-for-pickup: You have confirmed shipment of the order to the store. (Status in Order Orchestration is *Intransit*.) • W (Waiting) = Brokered backorder: The request message has been sent to Order Orchestration, but the response has not yet been received. • Y (Pending Cancel) = – Brokered backorder: You have canceled the order line (including the Order Orchestration request), or you have canceled just the Order Orchestration request at the Work with Order Broker Screen, but you have not yet received a confirmation of the cancellation from Order Orchestration. – Store pickup: You have canceled the order through order maintenance, but have not yet received the confirmation of the cancellation from Order Orchestration. **Note:** You cannot include Order Orchestration records on the report if their status is Unfulfillable (U), Closed (C), Completed (X), or Error (E). *Optional.*
Fulfilling location	Optionally, select a single store location, or leave this field blank to select records regardless of fulfilling location. This information is from Work with Store Cross Reference (WSCR). See the Order Orchestration Originating Location, Fulfilling Location, and Pickup Location for a discussion. *Alphanumeric, 50 positions; optional.*

Field	Description
Older than	Optionally, enter a number of days to have the report include Order Orchestration records only if their age exceeds this number, or leave this field set to 00000 to select records that are at least two days old. **Note:** It is not possible to include Order Orchestration records from the current or previous day on the report. Only records that are at least two days old are eligible for selection. *Numeric, 5 positions; optional.*

Note:

The Order Orchestration Aging Report is accessible at the Document Management Screen. It is not available by selecting a submitted job at the Job Management Screen.

Stored Value Card Integration

Topics in this part: The following topics describe the functions available for stored value card integration.

- Stored Value Card Overview and Setup provides an overview of stored value card processing and required setup.
- Stored Value Card Purchase and Activation describes the processing that occurs when a stored value card is purchased and activated.
- Working with Physical Stored Value Card Assignment (WPSA) describes how to assign a number to a physical stored value card.
- Stored Value Card Balance Inquiry (MSVB) describes the processing that occurs when you perform a stored value card balance inquiry.
- Stored Value Card Authorization Reversal describes the processing that occurs when you reimburse a stored value card payment a cancellation or deactivation amount.
- Transmitting Activation and Reversal Transactions (SSVC) describes how to process stored value card download triggers and generate stored value card XML messages to send to the service bureau for processing.
- Generating Stored Value Card Refunds describes how to generate a new stored value card to send to the sold to customer when you process a stored value card credit.
- Customer Engagement Stored Value Card Integration describes the integration between Order Management System and the Oracle Retail Customer Engagement stored value card system.

Working with Physical Stored Value Card Assignment (WPSA)

Purpose: Before you can activate a stored value card, you must first assign a number to the card. Assigning a number to a physical stored value card occurs after pick slip generation. Use this menu option to assign a number to a physical stored value card by selecting the associated pick control number.

Assigning numbers using an external system: You can use the Pick Message from Order Administration (CWPickOut) to send physical stored value card information to an external system. The external system assigns a number to the card and returns the number in the *svc_card_nbr* tag in the *CWPickIn XML Message*. When Order Administration receives a CWPickIn message that contains a stored value card number, the system creates a record in the Billing SVC Data Queue table and sends the information to billing. See Billing a Stored Value Card.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

For more information: See:

- Assigning Numbers to Virtual Stored Value Cards for more information on assigning a number to a virtual stored value card.
- Assigning a Stored Value Card Number for an overview on assigning a number to a physical or virtual stored value card.

In this topic:

- Pick SVC Assignment/Billing Screen
- Stored Value Card Assignment Screen

Pick SVC Assignment/Billing Screen

Use this screen to select the physical stored value card for which you wish to assign a number, by selecting the associated pick control number.

An error message indicates if you enter a pick control number that does not contain a physical stored value card item (*SVC type* is Physical Card or Physical Card/Early Notify): `Pick control# not valid for SVC number assignment.`

Once you select a physical stored value card by pick control number, select OK to advance to the Stored Value Card Assignment Screen.

How to display this screen: Enter WPSA in the *Fast path* field or select Work with Stored Value Card Assignment from a menu.

Field	Description
Pick control #	The pick control number containing the physical stored value card item for which you wish to assign a number. An error message indicates if you enter a pick control number that does not contain a physical stored value card: `Pick control# not valid for SVC number assignment.` *Numeric, 7 positions; required.*

Stored Value Card Assignment Screen

Purpose: Use this screen to define a number for each physical stored value card associated with the selected pick control number.

Typically, the stored value card number is printed on the physical card. You can enter this number in the *Stored value card number* field on this screen. A separate line displays for you to enter a number for each physical card associated with the pick control number.

> **Note:**
>
> Depending on the user's authority to credit card information, the system writes a record to the Credit Card Audit table when this screen is displayed. See *Logging Credit Card Data Access* in the Data Security Guide on My Oracle Support (2953017.1) for more information.

Stored value card number validation

- The system performs a modulus check against the stored value card number if a method is specified in the Stored Value Card Modulus Checking Method (I24) system control value. If the stored value card number fails the modulus check, an error message indicates: `Card number failed modulus check.`
- If MU is selected as the type of modulus check to perform and the User Defined Modulus Check Program (E94) system control value is blank, an error message indicates `Modulus check program has not been specified for SCV E94.`
- You must define a number for each stored value card associated with the pick control number. An error message indicates if you do not define a number for each physical stored value card: `All stored value card numbers must be entered before accepting.`
- You cannot assign the same number to more than one stored value card on the pick control record or an error message indicates: `Duplicate card number on pick# 9999 line# 2.`
- You cannot enter a number that is already assigned to an existing stored value card or an error message indicates: `Card number entered already used.`

How to display this screen: Select OK at the Pick SVC Assignment/Billing Screen after entering a pick control number associated with a physical stored value card.

Field	Description
Control#	The pick control number containing the physical stored value cards to which you wish to assign numbers. *Numeric, 7 positions; display-only.*
Billing batch#	The billing batch number associated with the pick control number containing the physical stored value card. *Numeric, 7 positions; display-only.*
Order#	The order number and ship to number where the physical stored value cards were purchased. *Order #: Numeric, 8 positions; display-only.* *Ship to #: Numeric, 3 positions; display-only.*

Field	Description
Line#	The pick control line number associated with the physical stored value card. *Numeric, 3 positions; display-only.*
Item	The item number of the physical stored value card item. *Alphanumeric, 12 positions; display-only.*
SKU	The SKU code of the physical stored value card item. *Alphanumeric, 14 positions; display-only.*
Description	A description of the physical stored value card item. The first 25 positions display. *Alphanumeric, 25 positions; display-only.*
Qty	The quantity of the physical stored value card associated with the pick control number. This is the number of cards to which you must assign a number. *Numeric, 5 positions; display-only.*
Amount	The issue amount assigned to each physical stored value card purchased. *Numeric, 13 positions with a 2-place decimal; display-only.*
Stored value card number	The number you wish to assign to the physical stored value card. Typically, this number is printed on the physical card. A separate line displays for you to enter a number for each physical card associated with the pick control number. The full stored value card number displays, regardless if a default credit card number format is defined at the Credit Card Number Layout Screen. This allows you to verify the stored value card number you are entering. See Stored value card number validation for additional edits the system performs against the stored value card number. *Numeric, 20 positions; required.*

Screen Option	Procedure
Accept the stored value card number assignment	Select Accept to assign the stored value card number to the physical card, linking the stored value card to the recipient card holder.
Reject the stored value card number assignment	Select Reject. The system does not assign the number to the stored value card.

If you accept: If you accept the stored value card number assignment, the system:

- assigns the number to the physical stored value card and updates the Pick Stored Value Card Table.
- sends the pick control number associated with the physical stored value card item to billing if the Use Streamlined Stored Value Card Billing (I23) system control value is selected; otherwise the system sends the card to billing once it is wanded and billed at your manifesting station.

> **Note:**
>
> If you do not Use Streamlined Stored Value Card Billing (I23), you can update the stored value card number at the Pick SVC Assignment/Billing Screen by entering a new number over the existing number. Once you bill the stored value card item, you cannot update the stored value card number.

Stored Value Card Balance Inquiry (MSVB)

Overview: You can inquire on the remaining amount available on a stored value card:

- Using the Stored Value Card Balance Inquiry (MSVB) menu option; see Stored Value Card Balance Inquiry (MSVB).
- In order entry and maintenance; see Order Entry/Maintenance Balance Inquiry.
- Before performing batch authorization against the card during pick slip generation or drop ship processing; see Batch Authorization Balance Inquiry.

> **Note:**
>
> This option is also available in Modern View.

In this topic:

- Stored Value Card Balance Inquiry (MSVB)
- Stored Value Card Balance Inquiry Screen (MSVB)
- Order Entry/Maintenance Balance Inquiry
  - Balance Inquiry For Window
- Batch Authorization Balance Inquiry

Stored Value Card Balance Inquiry (MSVB)

Purpose: Use the Stored Value Card Balance Inquiry menu option to submit a stored value card balance inquiry request.

For more information: See Stored Value Card Balance Inquiry (MSVB).

Stored Value Card Balance Inquiry Screen (MSVB)

Use this screen to specify the stored value card whose balance you wish to know.

> **Note:**
>
> Depending on the user’s authority to credit card information, the system writes a record to the Credit Card Audit table when this window is displayed. See *Logging Credit Card Data Access* in the Data Security Guide on My Oracle Support (2953017.1) for more information.

How to display this screen:

- Enter MSVB in the *Fast path* field or select Stored Value Card Balance Inquiry from a menu.
- Select Balance Inquiry on the Customer Selection Screen.

> **Note:**
>
> The system returns you to the Customer Selection screen after you complete the balance inquiry.

Field	Description
Pay type	The code for the stored value card pay type assigned to the stored value card number whose remaining balance you are inquiring. The pay type you enter must be a stored value card pay type or an error message indicates: `Pay type not eligible for balance inquiry.` *Numeric, 2 positions; required.*
Card number	The stored value card number whose balance you are inquiring. *Alphanumeric, 20 positions; required.*
SVC ID #	The ID number assigned to the stored value card. Include only if your stored value card processor supports it. *Numeric, 9 positions; optional.*
Balance	The remaining balance on the stored value card. This field is blank until you receive a balance inquiry response from the service bureau. However, the service bureau may return a blank balance if the stored value card number exists, but has not yet been activated or the remaining balance is zero. *Numeric, 13 positions with a 2-place decimal; display-only.*

Screen Option	Procedure
Submit a stored value card balance inquiry request	Select Submit Request.

Instructions: Use the following steps to submit a stored value card balance inquiry request from the Stored Value Card Balance Inquiry Screen (MSVB).

#	Step
1.	Enter a stored value card pay type, card number, and optionally ID number, and select OK.
2.	The system looks at the *Authorization service* field defined for the stored value card pay type to determine the service bureau that performs balance inquiries for the stored value card pay type.

#	Step
3.	The system looks at the *Communication type* field defined for the service bureau to determine the method of communication used to transmit balance inquiry transactions between Order Administration and the service bureau. Integration Layer indicates Order Administration communicates with the external system using advanced queuing. • The system looks at the *SVC balance inquiry integration layer process* field defined for the service bureau to determine the integration layer process used to process stored value card balance inquiries. • The integration layer process sends the stored value card balance inquiry request to the service bureau and waits for a balance inquiry response, based on the number of seconds defined in the *Wait time* field for the integration layer process. Payment Link indicates Order Administration communicates with the external system using a point-to-point integration instead of using advanced queuing. The system looks at the settings in the Interface Properties to communicate with the service bureau using a point-to-point integration. **Note:** This option is available for the Customer Engagement Stored Value Card Integration. The system uses the Customer Engagement Inquiry Request to send the balance inquiry request to Oracle Retail Customer Engagement and receives the response in the Customer Engagement Inquiry Response.
4.	If a response is received from the service bureau, the system displays the remaining balance amount for the stored value card in the *Balance* field. However, this field may remain blank if the stored value card number exists, but has not yet been activated.00 displays if the remaining balance is zero. If a response is not received from the service bureau, the system displays the message: `No response from service.`

Order Entry/Maintenance Balance Inquiry

Purpose: Use the following steps to submit a stored value card balance inquiry request from order entry/maintenance.

1. At the Enter Payment Method screen, select Balance Inquiry for a stored value card payment method.

   You can also select this option at the Enter Credit Card For window. However, an error message indicates if you have not yet created the stored value card payment method on the order: `Must create pay method before Balance Inquiry.`

2. The system looks at the *Authorization service* field defined for the stored value card pay type to determine the service bureau that performs balance inquiries for the stored value card pay type.

3. The system looks at the *Communication type* field defined for the service bureau to determine the method of communication used to transmit balance inquiry transactions between Order Administration and the service bureau.

- Integration Layer indicates Order Administration communicates with the external system using advanced queuing.
  - The system looks at the *SVC balance inquiry integration layer process* field defined for the service bureau to determine the integration layer process used to process stored value card balance inquiries.
  - The integration layer process sends the stored value card balance inquiry request to the service bureau and waits for a balance inquiry response, based on the number of seconds defined in the *Wait time* field for the integration layer process.
- Payment Link indicates Order Administration communicates with the external system using a point-to-point integration instead of using advanced queuing.

  The system looks at the settings in the Interface Properties to communicate with the service bureau using a point-to-point integration.

  > **Note:**
  >
  > This option is available for the Customer Engagement Stored Value Card Integration. The system uses the Customer Engagement Inquiry Request to send the balance inquiry request to Oracle Retail Customer Engagement and receives the response in the Customer Engagement Inquiry Response.

4. If a response is received from the service bureau, the system displays the Balance Inquiry For Window, indicating the remaining balance on the stored value card.

If a response is not received from the service bureau, the system displays the message: `No response from service.`

Balance Inquiry For Window

Use this window to review the remaining balance on a stored value card during order entry/maintenance.

When a balance is received, you can:

- Select OK to add the stored value card balance as the amount to charge for the stored value card payment on the order. You can also enter a lesser amount in the *Balance* field if you wish to use a partial amount of the remaining balance on the card as payment on the order.
- Select Exit to return to the previous screen without adding the stored value card balance as the amount to charge on the order.

Note:

- Depending on the user's authority to credit card information, the system writes a record to the Credit Card Audit table when this window is displayed. See *Logging Credit Card Data Access* in the Data Security Guide on My Oracle Support (2953017.1) for more information.
- This screen may return a blank balance if the stored value card number exists, but has not yet been activated by the service bureau or the remaining balance is zero.

How to display this screen: This screen displays when a balance inquiry response is received from the service bureau, after you send a stored value card balance inquiry request to the service bureau by:

- Selecting Balance Inquiry for a stored value card payment method at the Enter Payment Method screen.
- Selecting Balance Inquiry at the Enter Credit Card For window.

Field	Description
Pay type	The code and description of the stored value card pay type assigned to the stored value card number whose remaining balance you are inquiring. *Code: Numeric, 2 positions; display-only.* *Description: Alphanumeric, 30 positions; display-only.*
Card #	The stored value card number whose balance you are inquiring. *Alphanumeric, 20 positions; display-only.*
Balance	The remaining balance on the stored value card. *Numeric, 13 positions with a 2-place decimal; required.*

Batch Authorization Balance Inquiry

Purpose: Use the following steps to submit a stored value card balance inquiry request before performing batch authorization against the stored value card.

Note:

In order to perform a balance inquiry before batch authorization, the Perform Balance Inquiry during Batch Authorizations (J19) system control value must be selected.

#	Step
1.	Submit pick slip generation or drop ship processing that includes an order with an active stored value card pay type that requires batch authorization. **Note:** The system compares the authorized amount across all stored value card pay types on the order against the pick total to determine if the stored value card requires batch authorization. If the authorized amount across all stored value card pay types on the order is equal to or greater than the pick total, the system does not send perform batch balance inquiry against the card.
2.	The system looks at the *Authorization service* field defined for the stored value card pay type to determine the service bureau that performs balance inquiries for the stored value card pay type.
3.	The system looks at the *Communication type* field defined for the service bureau to determine the method of communication used to transmit balance inquiry transactions between Order Administration and the service bureau. Integration Layer indicates Order Administration communicates with the external system using advanced queuing. • The system looks at the *SVC balance inquiry integration layer process* field defined for the service bureau to determine the integration layer process used to process stored value card balance inquiries. • The integration layer process sends the stored value card balance inquiry request to the service bureau and waits for a balance inquiry response, based on the number of seconds defined in the *Wait time* field for the integration layer process. Payment Link indicates Order Administration communicates with the external system using a point-to-point integration instead of using advanced queuing. The system looks at the PAY_LINK properties in Working with Customer Properties (PROP) to communicate with the service bureau using a point-to-point integration. **Note:** This option is available for the Customer Engagement Stored Value Card Integration. The system uses the Customer Engagement Inquiry Request to send the balance inquiry request to Oracle Retail Customer Engagement and receives the response in the Customer Engagement Inquiry Response.

#	Step
4.	If a response is received from the service bureau, and: • The balance is equal to or greater than the charge amount, the system continues with authorization processing to authorize the stored value card for the charge amount. • The balance is less than the charge amount and the stored value card payment is the catch-all payment on the order, the system does not authorize the stored value card and does not generate a pick slip for the order. In addition, the system writes an order payment history message indicating the stored value card did not have the available funds: `H INSUFFICIENT FUNDS ON STORED VALUE CARD SVC_BALANC`. Also, if a Hold Reason for Stored Value Cards with Insufficient Funds (J18) is defined, the system places the order on hold. **Note:** If two or more pick slips are generated for the same order and one of the pick slips fails balance inquiry for insufficient funds, the system declines all pick slips for the order. For example, if the available balance on a stored value card is 100.00 and during pick slip generation, the system generates two pick slips for an order, the first pick slip requiring a stored value card balance of 60.00 and the second pick slip requiring a stored value card balance of 70.00, the system will fail both pick slips even though the first pick slip required a balance that was less than the balance on the stored value card. • The balance is less than the charge amount and the stored value card payment is not the catch-all payment on the order, the system authorizes the stored value card for the remaining balance and authorizes the catch-all payment for the remaining amount to authorize. In addition, the system writes an order payment history message indicating the charge amount for the stored value card pay type was changed to the remaining balance: `M Amount: 50.00 to 25.00 SVC_BALANC`.

Note:

If a balance inquiry response is not received from the service bureau, for example, due to communication errors, the system will continue with batch authorization.

Examples: The following examples explain what happens to a stored value card pay type on an order, based on the remaining balance on the card.

Example:	Balance:	Results:
Order total = $100.00 Stored value card = catch-all	$120.45	The system authorizes the stored value card pay type for $100.00. Once the stored value card on the order is authorized, the system generates a pick slip. The remaining balance on the stored value cad is $20.45.

Example:	Balance:	Results:
Order total = $100.00 Stored value card = catch-all Credit card = $25.00	$45.50	Because the stored value card does not have $75.00 remaining to apply to the order, the system does not authorize the pay types on the order and does not generate a pick slip for the order. If a Hold Reason for Stored Value Cards with Insufficient Funds (J18) is defined, the system places the order on hold. The remaining balance on the stored value card is $45.50.
Order total = $100.00 Stored value card = $75.00 Credit card = catch-all	$45.50	The system authorizes the stored value card for $45.50 and authorizes the credit card for $54.50. Once the pay types on the order are authorized, the system generates a pick slip. The remaining balance on the stored value card is zero. An order payment history message is created: `M Amount: 75.00 to 45.50 SVC_BALANC`

Transmitting Activation and Reversal Transactions (SSVC)

Purpose: Use this menu option to process activation and authorization reversal download triggers and generate the corresponding messages to send to the service bureau for processing.

System control value: The Use Activation / Reversal Batch Processing (I50) system control value controls whether activation and authorization reversal transactions are processed immediately or in batch.

- If selected, the system does not process activation or authorization reversal trigger records until you submit the batch process using this menu option or a periodic function.
  - Periodic function SVCACT (program name PFR0076) processes activation trigger records.
  - Periodic function SVCREV (program name PFR0077) processes authorization reversal trigger records.

  In this situation, the SVC Activation and SVC Reversal integration layer jobs can remain inactive.
- If unselected, when active, the Activation and Reversal integration layer jobs monitor for activation and authorization reversal trigger records to process at defined intervals, based on the *Outbound delay time*.

For more information: See:

- Stored Value Card Purchase and Activation for more information on activating a stored value card.
- Stored Value Card Authorization Reversal for more information on performing a stored value card authorization reversal.

- Credit Card Authorization Reversal for more information on performing a credit card authorization reversal.
- Working with Outbound Interface Transactions (WOIT) for more information on reviewing triggers.

Transmit SVC/CC Transactions Screen

Use this screen to submit a batch job to process activation and authorization reversal download triggers and generate the corresponding messages to send to the service bureau for processing.

You can select to process activations or authorization reversals from this screen.

How to display this screen: Enter SSVC in the *Fast path* field or select Transmit Stored Value Card Transactions from a menu.

Field	Description
Activations	Indicates if the submitted batch job processes activation download triggers. Valid values: Selected = The submitted batch job processes activation download triggers. Unselected = The submitted batch job does not process activation download triggers. Activation download triggers are identified by: • *File code*: SVC. • *Key*: identifies the specific company, order number, ship to number, order detail sequence number, and stored value card sequence number associated with the SVC download trigger. For example, the *Key* `555000066760010000100004` indicates the stored value card information is located in company 555 for order number 6676, ship to number 1, order detail sequence number 1, and stored value card number 4. See Activating a Stored Value Card for additional processing information.

Field	Description
Reversals	Indicates if the submitted batch job processes authorization reversal download triggers. Valid values: Selected = The submitted batch job processes authorization reversal download triggers. Unselected = The submitted batch job does not process authorization reversal download triggers. Authorization reversal download triggers are identified by: • *File code*: AHR. • *Key*: identifies the specific company, order number, order payment method sequence number, authorization sequence number, and authorization reversal sequence number in the SVC Authorization Reversal table. For example, the *Key* `5550000006794001001001` indicates the authorization reversal information is located in company 555 for order number 6794, order payment method sequence number 001, authorization sequence number 001, and authorization reversal sequence number 001. See: • Stored Value Card Authorization Reversal Process for more information on processing stored value card authorization reversals. • Credit Card Authorization Reversal for more information on processing credit card authorization reversals.

Screen Option	Procedure
Submit the batch job to process download triggers	Select Submit. See: • Activating a Stored Value Card • Stored Value Card Authorization Reversal • Credit Card Authorization Reversal

Importing Item/SKU and Set Data

Topics in this part: The following topics describe how to import item/SKU and set data into Order Administration from an external system.

- Importing Item-Related Supporting Data (SDUP) provides details on importing items/SKU information, item-related supporting table information, and set components into Order Administration.
- Importing Set Components (WCUP) provides details on building sets, including finished goods and variable sets.
  - Work with Component Upload Screen (WCUP)

Importing Item-Related Supporting Data (SDUP)

Purpose: Use the Submit Supporting Data Upload option to import supporting data related to items and order maintenance.

In this topic:

- Submit Supporting Data Upload Screen (SDUP)
- Supporting Data Upload Table
- Understanding Supporting Data Upload Errors

Periodic function: You can also submit the upload through the UPLSDTA periodic function.

Submit Supporting Data Upload Screen (SDUP)

Purpose: Use this screen to create new records in supporting tables based on the records that are currently in the Supporting Data Upload table for your company. You can use this screen to create records in the following tables:

- Long SKU Division
- Long SKU Department
- Long SKU Class
- Item Class
- SKU Elements 1, 2, and 3
- Item Status
- Retail Class
- Return Reason
- Exchange Reason

How to display this screen: Enter SDUP in the *Fast path* field at the top of any menu, or select Submit Supporting Data Upload from a menu.

When you select Submit at this screen, the system submits the SUPPUPLOAD job.

Job processing:

- The job evaluates each record in the Supporting Data Upload table that is associated with your current company.
- If the job can create the record in the specified table without error, it creates the record and deletes the Supporting Data Upload record.
- If the Supporting Data Upload record is in error for any reason, the job leaves the record in the table and updates it with a description of the error.
- Since the job selects records in your company, records that do not have a valid company number remain in the table.

Supporting Data Upload Table

The contents of this table are described below.

Company field: The company field is required for all record types. The company number is numeric, three positions, and is validated against the Company table.

Additional fields ignored: If the record includes information in additional fields not listed below, the system ignores the information. For example, if the *Misc1* field is populated for a record type that does not require this information, the contents of the field are discarded.

When you select Submit at the Submit Supporting Data Upload Screen (SDUP), the system process all error-free records whose *Company* field matches the submitting company, and ignores any records in the table whose *Company* does not match or that have already been flagged with an error reason.

Type	Updates	Additional Fields Used to Create Records
EXR	Exchange Reason: Establishing Exchange Reason Codes (WEXR)	*Code* = Numeric, 3 positions. The exchange reason code. *Description* = Alphanumeric, 30 positions. Each of the above fields is required. You can use Establishing Exchange Reason Codes (WEXR) to enter additional information. See that menu option for more information.
ICL	Item Class: Working with Item Classes (WICL)	*Code* = Alphanumeric, 3 positions. The item class code. *Description* = Alphanumeric, 30 positions. Each of the above fields is required. **Note:** You can use Working with Item Classes (WICL) to enter additional information for an item class. See that menu option for more information.
IST	Item Status: Working with Item Status (WIST)	*Code* = Alphanumeric, 1 position. The item status code. *Description* = Alphanumeric, 30 positions. Each of the above fields is required. **Note:** You can use Working with Item Status (WIST) to enter order entry messages and a return disposition code. See that menu option for more information.

Type	Updates	Additional Fields Used to Create Records
LDV	Long SKU Division: Creating and Maintaining Long SKU Divisions (WLDV)	*Code* = Alphanumeric, 3 positions. The long SKU division code. **Note:** Although the long SKU division field is 4 positions elsewhere, the supporting data upload supports just 3 positions. *Description* = Alphanumeric, 30 positions. Each of the above fields is required.
LSC	Long SKU Class: Working with Long SKU Classes (WLSC)	*Code* = Numeric, 4 positions. The long SKU class code. *Description* = Alphanumeric, 30 positions. Each of the above fields is required. You cannot upload or work with long SKU classes if the Use Retail Integration (H26) system control value is selected.
LSD	Long SKU Department: Working with Long SKU Departments (WLSD)	*Code* = Numeric, 4 positions. The long SKU department code. *Description* = Alphanumeric, 30 positions. Each of the above fields is required. *Misc1* = Long SKU division. Alphanumeric, 3 positions. Required if the Require Long SKU Division with Long SKU Department (E85) system control value is selected; otherwise, optional. Must be a valid long SKU division.

Type	Updates	Additional Fields Used to Create Records
RTC	Retail Class: Working with Long SKU Departments (WLSD)	*Code* = Numeric, 4 positions. The retail class code. *Description* = Alphanumeric, 30 positions. *Misc1* = The long SKU department to which the retail class is being assigned. Numeric, 4 positions. Must be a valid long SKU department. Each of the above fields is required. **Note:** • You can assign a retail class to a long SKU department only if the Use Retail Integration (H26) system control value is selected. • You cannot create a retail class without assigning it to a specific long SKU department. • You can assign the same retail class to more than one long SKU department; however, you cannot assign a retail class to more than one long SKU department at a time. Since the *Misc1* field is not a key field for the Supporting Data Upload table, creating a second RTC record for the same retail class would be a duplicate record.

Type	Updates	Additional Fields Used to Create Records
RTR	Return Reason: Establishing Return Reason Codes (WRTR)	*Code* = Numeric, 3 positions. The return reason code. *Description* = Alphanumeric, 30 positions. Each of the above fields is required. You can use Establishing Return Reason Codes (WRTR) to enter additional information. See that menu option for more information.
SEO	SKU Element 1: Working with SKU Elements (WSK1, WSK2, WSK3)	*Code* = Alphanumeric, 4 positions. The SKU element. *Description* = Alphanumeric, 10 positions. *Misc1* = Sort sequence number. Numeric, 5 positions. All fields except *Misc1* are required.
SET	SKU Element 3: Working with SKU Elements (WSK1, WSK2, WSK3)	*Code* = Alphanumeric, 4 positions. The SKU element. *Description* = Alphanumeric, 10 positions. *Misc1* = Sort sequence number. Numeric, 5 positions. All fields except *Misc1* are required.
SEW	SKU Element 2: Working with SKU Elements (WSK1, WSK2, WSK3)	*Code* = Alphanumeric, 4 positions. The SKU element. *Description* = Alphanumeric, 10 positions. *Misc1* = Sort sequence number. Numeric, 5 positions. All fields except *Misc1* are required.

Understanding Supporting Data Upload Errors

When you run the upload, the job clears any Supporting Data Upload records if it was able to create a new record in the related target table. It updates each remaining record with a description of the error that prevented the update of the target table.

The information in the Supporting Data Upload table (MSSDUP) is not displayed on any screen.

Error	Notes
All record types	See the Supporting Data Upload Table for a summary of the requirements of each record type.
`Missing Code`	No code was specified for the Supporting Data Upload record.

Error	Notes
`Record already exists`	The record already exists in the related table. **Note:** See the RTC record type above for additional considerations related to retail class uploads.
`Missing Description`	No description was specified for the Supporting Data Upload record.
Exchange Reason	
`Exchange reason cannot exceed 999` or `Exchange Reason must be numeric`	The exchange reason is a three-position numeric code. See Establishing Exchange Reason Codes (WEXR) for background.
ICL (item class)	
`Item Class code cannot exceed 3 characters`	The item class code is a three-position alphanumeric field. See Working with Item Classes (WICL) for background.
IST (item status)	
`Item Status code cannot exceed 1 character`	The item status code is a one-position alphanumeric field. See Working with Item Status (WIST) for background.
LSC (long SKU class)	
`Long SKU Class not allowed when SCV H26 is set to Yes`	You cannot upload a long SKU class if the Use Retail Integration (H26) system control value is not selected.
`Long SKU Class cannot exceed 9999Long SKU Class must be numeric` `Long SKU Class is zero`	The long SKU class is a four-position numeric code.
LSD (long SKU department)	
`Long SKU Division code cannot exceed 3 characters`	The long SKU division code specified in the *Misc1* field exceeds three positions.
`Long SKU Division code is required`	No long SKU division code was specified in the *Misc1* field, and the Require Long SKU Division with Long SKU Department (E85) system control value is selected.
`Long SKU Department cannot exceed 9999`	The long SKU department code cannot exceed four positions.

Error	Notes
`Long SKU Division code does not exist`	The long SKU division code specified in the *Misc1* field is not valid. **Note:** This error occurs even if the Require Long SKU Division with Long SKU Department (E85) system control value is unselected.
`Long SKU Department must be numeric`	The long SKU department specified cannot include non-numeric characters.
RTC (retail class)	You can assign a retail class to a long SKU department if the Use Retail Integration (H26) system control value is selected. Also, you can assign the same retail class code to multiple long SKU departments, but not through the same supporting table upload process. See Working with Long SKU Departments (WLSD) for background.
`Retail Class valid only when SCV H26 is set to Yes`	The Use Retail Integration (H26) system control value is not selected.
`Long SKU Department code does not exist`	The long SKU department code specified in the *Misc1* field is not valid.
`Long SKU Department must be numeric`	The long SKU department code specified in the *Misc1* field is not numeric, or no long SKU department was specified.
`Long SKU Class cannot exceed 9999`	The retail class is a four-position numeric code.
`Long SKU Class must be numeric`	The retail class is a four-position numeric code.
RTR (return reason)	
`Return reason cannot exceed 999` or `Return reason must be numeric`	The return reason is a three-position numeric code. See Establishing Return Reason Codes (WRTR) for background.
SEO, SEW, SET (SKU element 1, 2, or 3)	See Working with SKU Elements (WSK1, WSK2, WSK3) for background on the SKU element fields.
`SKU Element code cannot exceed 4 characters`	The first, second, and third SKU elements are each four-position alphanumeric fields.
`Sort sequence must be numeric`	The first, second, and third SKU sort sequence numbers are each five-position numeric fields.

Error	Notes
`Description exceeds 10 characters`	The first, second, and third SKU descriptions are each ten-position alphanumeric fields.

Importing Set Components (WCUP)

Purpose: Use the set component upload to build sets, including standard sets, and variable sets.

Process overview: To create sets:

- Create the main set item. Use Performing Initial Item Entry (MITM) or the RI Item Upload Process to create the main set item, specifying the appropriate *Kit type*. For example, to create a variable main set item, select a *Kit type* of Variable Set.
- Specify additional information about the main set. Set up any additional information specific to the main set item, such as the item offer and item price.
  - Variable set? For a variable set, you need to first use either Entering Variable Set Information (WVST) or the set component upload to create variable set groups before you add variable set components to each group.
- Build the set components. You can use either the menu options described under Working with Sets or the set component upload to specify the component items included in the set.

Example:

To sell an assortment of pens as a set:

1. Use Performing Initial Item Entry (MITM) or the RI Item Upload Process to create the item PE123 with a *Kit type* of Set. At this time, you can assign the item to an offer and specify pricing for the set.
2. If necessary, use Performing Initial Item Entry (MITM) or the RI Item Upload Process to create each component item that will be included in the set.
3. Create the main set item if you are using Entering Set Information (WSET). (If you are using the set component upload, this step takes place automatically when you build components.)
4. Using Entering Set Information (WSET) or the set component upload, assign each component item to the set, specifying the quantity to add. Optionally, you can specify additional information, such as cost percentage or a coordinate group number to make sure the components ship together.

In this topic:

- Work with Component Upload Screen (WCUP)
- Submitting the Set Component Upload
  - Set Component Upload Table (INSCUP)
  - Understanding Set Component Upload Errors
- Component Upload Screen (Change Mode)

Work with Component Upload Screen (WCUP)

Purpose: Use this screen to create new sets and set components based on the records in the Set Component Upload table for your company. You can use this screen to create records in the following tables:

- Kit and Kit Detail
- Set and Set Detail
- Variable Set, Variable Set Detail, and Variable Set Group

Background on sets: See Working with Sets for general background on sets in Order Administration.

How to display this screen: Enter WCUP in the *Fast path* field at the top of any menu, or select Work with Set Component Upload from a menu.

Field	Description
Type	The type of set record being uploaded. Valid values are: • Set: See Entering Set Information (WSET) for background. • Variable Set Group: See Entering Variable Set Information (WVST) for background. • Variable Set Item: See Entering Variable Set Information (WVST) for background. If the *Type* in the Set Component Upload table is set to any other value, that value is displayed. The *Type* is an alphanumeric, 2-position field. Optionally, select a *Type* to restrict display to upload records of that type.
Master item	The main set item specified in the Set Component Upload record. You identify an item as a main set item through the *Kit type* field. The SKU fields, if any, are to the right. **Note:** To determine the set component item, select Change or Display. See the Component Upload Screen (Change Mode) for more information. *Item code: alphanumeric, 12 positions; optional.* *SKU codes: alphanumeric, three 4-position fields; optional.*
Error	The description of the error, if any, flagged by the upload program. This field is blank if you have not yet attempted to upload the record, or if you have corrected the error and the record can be resubmitted. See Understanding Set Component Upload Errors for more information.

Option	Procedure
Submit the set component upload process	Select Process to generate set headers and components based on the information in the Set Component Upload table. See Submitting the Set Component Upload for more information.

Option	Procedure
Change a set component upload record	Select Change for a record to advance to the Component Upload Screen (Change Mode) in Change mode.
Review a set component upload record	Select Display for a record to advance to the Component Upload screen in Display mode to review the set component and other detail information. You cannot change any information at this screen. See the Component Upload Screen (Change Mode) for field descriptions.
Delete a set component upload record	Select Delete to delete a set component record.

Submitting the Set Component Upload

Upload process: You can create set component records from the contents of the Set Component Upload table:

1. Create a Set Component file (INSCUP) file that you will use to populate the Set Component Upload Table (INSCUP) by:
   - Creating your own, using a text editor, or
   - Copying the sample file upload data, pasting the data into a text editor, and saving it with the file extension `.TXT`.

   > **Note:**
   >
   > To leave any field in the upload file blank, pass a space in an alphanumeric field or a 0 in a numeric field so that the file can be processed without errors. Leaving a field with no space or 0 is interpreted as null in the database and causes errors.

2. Use the contents of the upload file to create records in the Set Component Upload table:
   - Use the File Storage API to upload the contents of the file to the FILE_STORAGE table, and then use the UPSETCM periodic function (*Program name* PFR0134, *Parameter* INSCUP) to use the file contents to populate the Set Component Upload Table (INSCUP), or
   - Use the Work with File Upload Screen to upload the Set Component file and automatically populate the Set Component Upload table.
3. Use the contents of the Set Component Upload table to create or update set components:
   - Run the UPLSETS periodic function (*Program name* PFR0095), or
   - Select Process at the Work with Component Upload Screen (WCUP).

   Job processing:

   - Regardless of whether you use the UPLSETS periodic function or select Process at the Work with Component Upload Screen (WCUP), the job evaluates each record in the Set Component Upload table that is associated with your current company.

- If the job can create the record in the specified table without error, it creates the record and deletes the Set Component Upload record.
- If the Set Component Upload record is in error for any reason, the job leaves the record in the table and updates it with a description of the error.
- Since the job selects records in your company, records that do not have a valid company number remain in the table.

Set Component Upload Table (INSCUP)

The contents of this table are described below.

Sample Set Component Upload data: You can use the sample data below to create a record in the Set Component Upload table.

Sample Type S: Set and Set Detail upload record:

```
7|S|SET||||SETCOMP1||||1|50.00|1|0|0||0|
```

Sample Type VG: Variable Set and Variable Set Group upload record:

```
7|VG|VARIABLE||||VARIABLECMP1||||0|0|0|0|1|VARIABLE GROUP 1|2|
```

Sample Type VI: Variable Set Detail upload record:

```
7|VI|VARIABLE||||VARIABLECMP2||||0|0|0|0|1||0|
```

Additional information: Any additional information beyond the fields listed below is discarded in most cases; however, if a non-SKUed main set item or component item includes SKU fields, the process puts the record in error. See Understanding Set Component Upload Errors for more information.

Field	Description
Company	The company field is required for all record types and is validated against the Company table. *Numeric, 3 positions; required.*
Set type	Indicates the type of record to create. Valid values: • Type S: Set and Set Detail • Type VG: Variable Set and Variable Set Group • Type VI: Variable Set Detail **Note:** This field is not case-sensitive; the process treats f the same as F. *Alphanumeric, 2 positions; required.*
Master item	The finished good item for which you are building the components. If the Kit Header does not already exist, the process creates it when you upload the first component. *Alphanumeric, 12 positions; required.*
Master SKU elements 1, 2, and 3	*Alphanumeric, three 4-position fields. A valid SKU is required if the kit master item has SKU's.*

Field	Description
For each component used to make the finished good:	
Component item	*Alphanumeric, 12 positions; required.*
Component SKU elements 1, 2, and 3	*Alphanumeric, three 4-position fields. A valid SKU is required if the item has SKU's.*
Quantity	The quantity of the item used to create the finished good. *Numeric, 5 positions; required.*
Type S: Set and Set Detail	See Entering Set Information (WSET) for background.
Master item	The main set item for which you are building the components. The item must have its *Kit type* set to Set. If the Set record does not already exist, the process creates it when you upload the first component. *Alphanumeric, 12 positions; required.*
Master SKU elements 1, 2, and 3	*Alphanumeric, three 4-position fields. A valid SKU is required if the set item has SKU's.*
For each component to add to the order when the customer orders the set:	
Component item	*Alphanumeric, 12 positions; required.*
Component SKU elements 1, 2, and 3	*Alphanumeric, three 4-position fields. A valid SKU is required if the item has SKU's.*
Quantity	The quantity of the component to add to the order. *Numeric, 5 positions; required.*
Cost %	The percentage of the set's total cost contributed by this component. *Numeric, 5 positions with a 2-place decimal; optional.*
Coordinate group	A common coordinate group number assigned to components to make sure they ship together. *Numeric, 3 positions; optional.*

Field	Description
Type VG: Variable Set and Variable Set Group	**Note:** • When you use the Set Component Upload, you can create only one group for each variable set at a time. Because the group code is not part of the key to the table, creating more than one group for the same variable set would produce a duplicate key error. • You cannot create a variable set item as part of the VG set type. You need to use the VI set type to create a variable set item and assign it to the group. See Entering Variable Set Information (WVST) for background.
Master item	The main set item for which you are building the variable set group(s). The item must have its *Kit type* set to Variable Set. If the Variable Set record does not already exist, the process creates it when you upload the first variable set group. *Alphanumeric, 12 positions; required.*
Master SKU elements 1, 2, and 3	*Alphanumeric, three 4-position fields. A valid SKU is required if the variable set item has SKU's.*
For each group to add to the variable set:	
Group	The code identifying the group of like items from which the customer selects in order entry. *Numeric, 3 positions; required.*
Group description	The description of the group. Displayed in order entry. *Alphanumeric, 30 positions; required.*
# of items	The number of items or units that the customer can order from this group. *Numeric, 3 positions; required.*
Type VI: Variable Set Detail	
Master item	The main set item for which you are building the variable set components. The item must have its *Kit type* set to Variable Set, and the Variable Set record and Variable Set Group must already exist. *Alphanumeric, 12 positions; required.*
Master SKU elements 1, 2, and 3	*Alphanumeric, three 4-position fields. A valid SKU is required if the variable set item has SKU's.*
For each component item to add to the variable set group:	
Component item	*Alphanumeric, 12 positions; required.*

Field	Description
Component SKU elements 1, 2, and 3	*Alphanumeric, three 4-position fields. A valid SKU is required if the item has SKU's.*
Group	The variable set group in which to include the item. *Numeric, 3 positions; required.*

Understanding Set Component Upload Errors

When you run the upload, the job clears any Set Component Upload records if it was able to create a new record in the related target table. It updates each remaining record with a description of the error that prevented the update of the target table.

Which errors can you correct?

- You can use the Component Upload Screen (Change Mode) to correct errors related to any additional fields beyond the company, set type, component item and SKU, and component item and SKU.
- Otherwise, you can correct the record directly in the Set Component Upload table, or delete the record and recreate it, or create the record in the target table using the standard menu option.

Error	Notes
All component upload types	See the Set Component Upload Table (INSCUP) for a summary of the requirements of each record type.
`Record already exists`	The record already exists in the destination table.
`Invalid Type`	The *Type* was not K, S, VG, or VI. The error displayed at the Component Upload Screen (Change Mode) is `Master Item kit type not F,S,V.`
`Invalid Master Item`	The main set item specified does not exist.
`Invalid Master SKU`	The main set item specified is a SKU'd item, and no SKU's were specified in the upload table; or the main set item specified is a non-SKU'd item, and SKU's were specified.
`Missing Type`	No type was specified.
For all types except Variable Set Group (VG):	
`Invalid Component Item`	The component item specified does not exist.
`Invalid Component SKU`	The component item specified is a SKU'd item, and no SKU's were specified in the upload table; or the component item specified is a non-SKU'd item and SKU's were specified.
`Master Item kit type must be F`	The master item specified does not have its *Kit type* set to Finished Good.
`Quantity Required for record type`	No *Quantity* was specified for the component. The *Quantity* is a required field.

Error	Notes
`Work Order exists`	There is an open work order for the finished good. See Finished Good Work Order Processing (WWOR) for information. **Note:** The following do not cause errors when you upload finished good components: • Additional fields populated (except for SKU fields for a non-SKU'd item) • Adding components to an existing finished good • Creating a finished good with just one component
Set (Type S)	When you upload the first component for a main set item, the system automatically creates the Set header. See Entering Set Information (WSET) for background.
`Master Item kit type must be S`	The master item specified does not have its *Kit type* set to Set.
`Quantity Required for record type`	No *Quantity* was specified for the component. The *Quantity* is a required field. **Note:** The following do not cause errors when you upload set components: • Additional fields populated (except for SKU fields for a non-SKU'd item) • Adding components to an existing set • Creating a set with just one component • The *Cost %* amounts not adding up to 100%

Error	Notes
Variable Set Group (Type VG)	When you upload the first group for a variable main set item, the system automatically creates the Variable Set header. **Note:** • You must create the Variable Set Group before you can upload any of the items assigned to that group. • You cannot create multiple groups at a time for the same variable set. Because the group code is not part of the key to the table, creating more than one group for the same variable set would produce a duplicate key error. See Entering Variable Set Information (WVST) for background.
`Master Item kit type must be V`	The master item specified does not have its *Kit type* set to Variable Set.
`Missing # of items`	No *# of items* was specified for the group. The *# of items* is a required field.
`Missing Group`	No *Group* number was specified. The *Group* is a required field.
`Missing Group Description`	No *Group description* was specified. The *Group description* is a required field. **Note:** Populating additional fields (except for SKU fields for a non-SKU'd item) does not create an error when you upload a variable set group.
Variable Set Item (Type VI)	The variable set header and group must already exist before can upload a variable set item. See Entering Variable Set Information (WVST) for background.
`Master Item kit type must be V`	The master item specified does not have its *Kit type* set to Variable Set.
`Missing Group`	No *Group* number was specified. The *Group* is a required field.
`Invalid Group`	The *Group* number specified does not exist for the variable set.

Component Upload Screen (Change Mode)

Purpose: Use this screen to review or change the information in a Set Component Upload record.

For more information: See the Set Component Upload Table (INSCUP) for information on how to create Set Component Upload records.

What can you change? At this screen, you can change any of the information except the upload type, the main item/SKU, and the component item/SKU. If this information is incorrect, you can delete the upload record and create the component another way, such as sending a correct upload record or using the related menu option to create the component manually.

Errors flagged at this screen: This screen flags:

- All of the errors identified under Understanding Set Component Upload Errors, with the exception of the `Record already exists` error. The upload program identifies this error by comparing the information for the upload record with the information in the target table. You can delete records flagged with this error, as the upload will not process them. Also,
- Errors related to additional information that is not used for the component upload type. This is information that the upload program ignores. These errors are described below under the fields that trigger the errors.

How to display this screen: Select Change for a Set Component Upload record at the Work with Component Upload Screen (WCUP).

Field	Description
Type	The type of component to upload: • FINISHED GOOD: See Entering Finished Goods Information (WFGD) for background. • SET: See Entering Set Information (WSET) for background. • VARIABLE SET GROUP: See Entering Variable Set Information (WVST) for background. • VARIABLE SET ITEM: See Entering Variable Set Information (WVST) for background. If the *Type* in the Set Component Upload table is set to any other value, that value is displayed. The *Type* is an alphanumeric, 2-position field. *Alphanumeric; display-only.*
Master item	The main set item specified in the Set Component Upload record. You identify an item as a main set item through the *Kit type* field. *Alphanumeric, 12 positions; display-only.*
Master SKU	Additional information identifying the master item, such as its color or size. *Alphanumeric, three 4-position fields; display-only.*
Component item	The component item to upload. *Alphanumeric, 12 positions; display-only.*
Component SKU	Additional information about the component item, such as its color or size. *Alphanumeric, three 4-position fields; display-only.*
Quantity	The quantity of the component item/SKU to add to the order. Required for set components (type S). Not valid for variable set group or variable set items (types VG or VI). *Numeric, 5 positions; required or invalid depending on type.*

Field	Description
Cost	The percentage of the set's cost represented by the component. Used only for set components (type S). Invalid for other record types. *Numeric, 5 positions with a 2-place decimal; optional or invalid depending on type.*
Coordinate group#	A number you can assign to components to make sure they ship together. Valid for set components (type S). Invalid for other record types. You cannot assign a coordinate group number of 999 to a component of a regular set (type S). *Numeric, 3 positions; optional or invalid depending on type.*
Interval	Not currently implemented. *Numeric, 5 positions.*
Group	The code identifying the group of like items from which the customer selects in order entry for a variable set. Required for variable set groups and components (types VG and VI). Invalid for other record types. *Numeric, 3 positions; required or invalid depending on type.*
Description	The description of the variable set group. Required for variable set groups (type VG). Invalid for other record types. *Numeric, 3 positions; required or invalid depending on type.*
# of items	The number of items or units that the customer can order from the variable set group. Required for variable set groups (type VG). Invalid for other record types. *Numeric, 3 positions; required or invalid depending on type.*
Error	The error assigned by the upload program. See Understanding Set Component Upload Errors for a list of errors.

ChannelAdvisor Integration

Topics in this part: The following topics describe the integration between Order Administration and ChannelAdvisor.

- ChannelAdvisor Integration Overview provides an overview of the various components of the integration.
- ChannelAdvisor Setup provides information on the setup required within Order Administration to support the integration.
- Working with ChannelAdvisor Accounts (WCAA) describes the screens you use to up accounts, marketplaces, and offers for integration with ChannelAdvisor.

Working with ChannelAdvisor Accounts (WCAA)

Purpose: Use this option to set up your ChannelAdvisor account and marketplaces.

Background: See ChannelAdvisor Integration Overview for background on the ChannelAdvisor integration.

Additional setup: See ChannelAdvisor Setup for information on additional required setup for the ChannelAdvisor integration.

In this topic:

- Work with ChannelAdvisor Accounts Screen
- Create ChannelAdvisor Account Screen
- Work with ChannelAdvisor Marketplaces Screen
- Create ChannelAdvisor Marketplace Screen
- Work with ChannelAdvisor Offers Screen
- Create ChannelAdvisor Offer Screen

> **Note:**
>
> The ChannelAdvisor integration has been designed and tested to work for the Amazon Marketplace. To use the ChannelAdvisor integration with a marketplace other than Amazon, contact your Order Administration project manager.

Work with ChannelAdvisor Accounts Screen

Use this screen to work with ChannelAdvisor accounts and marketplaces.

How to display this screen: Enter WCAA in the *Fast path* field at the top of any menu, or select ChannelAdvisor Work with Accounts from a menu.

Field	Description
Account	The account ID assigned by ChannelAdvisor for your account. Upper and lower case. **Note:** You may be able to verify the account ID by logging into ChannelAdvisor, selecting the account, and then My Account > Account Authorizations. *Alphanumeric, 50 positions; optional.*
Description	The description of your ChannelAdvisor account. *Alphanumeric, 30 positions; optional.*

Option	Procedure
Create a new ChannelAdvisor account	Select Create to advance to the Create ChannelAdvisor Account Screen.

Option	Procedure
Change an existing ChannelAdvisor account	In the *Action* field, select Change to advance to the Change ChannelAdvisor Account screen. At this screen, you can change any information except the *ChannelAdvisor account ID*. See the Create ChannelAdvisor Account Screen for field descriptions.
Display an existing ChannelAdvisor account	In the *Action* field, select Display to advance to the Display ChannelAdvisor Account screen. You cannot change any information at this screen. See the Create ChannelAdvisor Account Screen for field descriptions.
Delete an existing ChannelAdvisor account	In the *Action* field, select Delete. At the Confirm Delete window, select Yes to delete the account; otherwise, select No.
Work with ChannelAdvisor marketplaces	In the *Action* field, select Marketplaces to advance to the Work with ChannelAdvisor Marketplaces Screen.
Work with ChannelAdvisor offers	In the *Action* field, select Integration Offers to advance to the Work with ChannelAdvisor Offers Screen.

Create ChannelAdvisor Account Screen

Purpose: Use this screen to set up the ChannelAdvisor account you use to integrate with ChannelAdvisor, including information required for the inventory and pricing uploads to ChannelAdvisor and authentication information required for ChannelAdvisor web services (orders, shipments, and refunds).

How to display this screen: Select Create at the Work with ChannelAdvisor Accounts Screen.

Field	Description
Account (ChannelAdvisor account ID)	The account ID assigned by ChannelAdvisor for your account. Upper and lower case. This ID is a GUID (globally unique identifier) composed of a string of hexadecimal digits, such as 21ec2020-3aea-1069-A2dd-08002b30309d. Not the same as the user ID you use to log into the ChannelAdvisor web site. **Note:** You may be able to verify the account ID by logging into ChannelAdvisor, selecting the account, and then My Accounts > Developer Network > Account Authorizations. *Alphanumeric, 50 positions.* *Create screen: Required.* *Change screen: Display-only.*
Description	The description of your ChannelAdvisor account. *Alphanumeric, 30 positions; required.*

Field	Description
Web Developer Key	A unique ID assigned by ChannelAdvisor. Upper and lower case. The developer key, Account (ChannelAdvisor account ID), and Web Developer Password are required for any call to a ChannelAdvisor API that accesses your account information. The developer key and password are included in the messages sent to ChannelAdvisor to request a list of orders, confirm shipments, and submit refunds. See ChannelAdvisor Integration Overview for descriptions of these processes. *Alphanumeric, 50 positions; optional, but required for the ChannelAdvisor integration.*
Web Developer Password	The password associated with the Web Developer Key. Upper and lower case. Not the same as the password you use to log into the ChannelAdvisor web site. The developer key and password are included in the messages sent to ChannelAdvisor to request a list of orders, confirm shipments, and submit refunds. See ChannelAdvisor Integration Overview for descriptions of these processes. *Alphanumeric, 50 positions; optional, but required for the ChannelAdvisor integration.*
Price Filename	The file name for the CAPRICE periodic function to use when creating the pricing upload file. Upper and lower case. **Note:** Both the inventory import and the pricing import may be listed with a *File Type* of Inventory in ChannelAdvisor. *Alphanumeric, 50 positions; optional, but required for the ChannelAdvisor integration.*
Local Price Folder	The folder on the Order Administration server for the CAPRICE periodic function to use when creating the price upload file. Set by Oracle, and cannot be changed. *Alphanumeric, 50 positions; display-only.*
When creating your application in ChannelAdvisor, record the following fields so that you can enter them correctly when creating or updating your ChannelAdvisor account in Order Administration.	

Field	Description
Application Id	A code generated automatically by ChannelAdvisor, identifying your system during authentication. Displayed at the Your Applications screen in ChannelAdvisor. Required for price and inventory integration with ChannelAdvisor. Case-sensitive. *Alphanumeric, 60 positions; optional, but required for the ChannelAdvisor integration.*
Shared Secret	A code generated automatically by ChannelAdvisor to authentication your system. Displayed at the Your Applications screen in ChannelAdvisor. Required for price and inventory integration with ChannelAdvisor. Case-sensitive. *Alphanumeric, 60 positions; optional, but required for the ChannelAdvisor integration.*
Refresh Token	A value generated by ChannelAdvisor during the initial authorization request. Required for price and inventory integration with ChannelAdvisor. Case-sensitive. **Generating the Refresh Token:** To generate the request token: • Log into the ChannelAdvisor Developer Console at https://api.channeladvisor.com/DeveloperConsole/Account/DevLogin. using your *Developer Key* and *Password*. • Create a new application if it does not exist already. • Highlight the client and select **Select Client**. • Select **Grant Access**. • At the New Integration Created window, copy the *Refresh Token* and paste it into the *Refresh Token* field at the **Create or Change ChannelAdvisor Account** screen in Order Administration. You need to retrieve the token before closing the window. **For more information:** See https://developer.channeladvisor.com/authorization/developer-console-token. If the refresh token is not correct, the log indicates: `Problem in retrieving Access Token.` *Alphanumeric, 60 positions; optional, but required for the ChannelAdvisor integration.*

Work with ChannelAdvisor Marketplaces Screen

Purpose: Use this screen to work with marketplaces where you sell through ChannelAdvisor. The CAORDUP periodic function matches the marketplace with the `ItemSaleSource` passed for an order to identify the:

- source code to apply to the order, based on your entry at this screen
- payment method to apply to the order, based on the pay type's *CA cross reference #*

See Importing Orders from ChannelAdvisor for background.

> **Note:**
>
> The ChannelAdvisor integration has been designed and tested to work for the Amazon Marketplace. To use the ChannelAdvisor integration with a marketplace other than Amazon, contact your Order Administration project manager.

How to display this screen: Select Marketplaces from the *Action* field for your ChannelAdvisor account at the Work with ChannelAdvisor Accounts Screen.

Field	Description
Account (ChannelAdvisor account)	The account ID assigned by ChannelAdvisor for your account. This ID is a GUID (globally unique identifier), as set up through the Create ChannelAdvisor Account Screen. *Alphanumeric, 50 positions; display-only.*
Description (unlabeled field)	The description of your ChannelAdvisor account, as set up through the Create ChannelAdvisor Account Screen. *Alphanumeric, 30 positions; display-only.*
Source	The source code to use on orders from this marketplace. Typically associated with the offer specified through the Work with ChannelAdvisor Offers Screen option. If the `ItemSaleSource` indicated for an order created through the CAORDUP periodic function matches the Marketplace, the periodic function applies this source code to the order. Enter a full or partial source code to display marketplaces that start with your entry. **Note:** The source code specified must use a line-level freight method. *Alphanumeric, 9 positions; optional.*

Field	Description
Marketplace	The name of the marketplace, such as Amazon, where you sell merchandise through ChannelAdvisor. If the `ItemSaleSource` indicated for an order received from ChannelAdvisor through the CAORDUP periodic function matches this setting, the periodic function: • applies the *Source* indicated here to the order • selects the pay type whose *CA cross reference #* matches this setting for the order **Note:** If there is more than one pay type whose *CA cross reference #* matches, the function selects the highest pay type code. Enter a full or partial marketplace name to display marketplaces that start with your entry. *Alphanumeric, 30 positions; optional.*

Option	Procedure
Create a new marketplace	Select Create to advance to the Create ChannelAdvisor Marketplace Screen.
Change an existing marketplace	Select Change from the *Action* field to advance to the Change ChannelAdvisor Marketplace screen. At this screen, you can change the *Source* or the *Marketplace*. See the Create ChannelAdvisor Marketplace Screen for field descriptions.
Delete a marketplace	Select Delete for a marketplace. At the Confirm Delete window, select Yes to delete the marketplace; otherwise, select No.

Create ChannelAdvisor Marketplace Screen

Purpose: Use this screen to create a new marketplace where you sell through ChannelAdvisor. The CAORDUP periodic function matches the marketplace with the `ItemSaleSource` passed for an order to identify the:

- source code to apply to the order, based on your entry at this screen
- payment method to apply to the order, based on the pay type's *CA cross reference #*

Purpose: See Importing Orders from ChannelAdvisor for background.

How to display this screen: Select Create at the Work with ChannelAdvisor Marketplaces Screen.

Field	Description
Account (ChannelAdvisor account)	The account ID assigned by ChannelAdvisor for your account. This ID is a GUID (globally unique identifier), as set up through the Create ChannelAdvisor Account Screen. *Alphanumeric, 50 positions; display-only.*
Description	The description of your ChannelAdvisor account, as set up through the Create ChannelAdvisor Account Screen. *Alphanumeric, 30 positions; display-only.*
Source	The source code to use on orders from this marketplace. Typically associated with the offer specified through the Work with ChannelAdvisor Offers Screen option. If the `ItemSaleSource` indicated for an order created through the CAORDUP periodic function matches the *Marketplace*, the periodic function applies this source code to the order. **Note:** The source code specified must use a line-level freight method. *Alphanumeric, 9 positions; required.*
Marketplace	The name of the marketplace, such as Amazon, where you sell merchandise through ChannelAdvisor. If the `ItemSaleSource` indicated for an order received from ChannelAdvisor through the CAORDUP periodic function matches this setting, the periodic function: • applies the *Source* indicated here to the order • selects the pay type whose *CA cross reference #* matches this setting for the order The marketplace name needs to match a ChannelAdvisor Site Token value. **Note:** If there is more than one pay type whose *CA cross reference #* matches, the function selects the highest pay type code. *Alphanumeric, 30 positions; required.*

Work with ChannelAdvisor Offers Screen

Purpose: Use this screen to set up the offer you use to control pricing for the ChannelAdvisor integration, including the label for the ChannelAdvisor offer price. You send pricing information to ChannelAdvisor through the CAPRICE periodic function. This offer should match the ChannelAdvisor SKU X-Ref Offer (L92).

> **Note:**
>
> Although you can set up multiple offers with this menu option, typically you use a single offer for integration with ChannelAdvisor.

Background: SeeChannelAdvisor Integration Overview for background on the ChannelAdvisor integration, especially Sending Current Prices to ChannelAdvisor.

Additional setup:

- See Working with ChannelAdvisor Accounts (WCAA) for information on setting up accounts and marketplaces for integration with ChannelAdvisor.
- See Working with ChannelAdvisor Accounts (WCAA) for information on additional required setup for the ChannelAdvisor integration.

> **Note:**
>
> The ChannelAdvisor integration has been designed and tested to work for the Amazon Marketplace. To use the ChannelAdvisor integration with a marketplace other than Amazon, contact your Order Administration project manager.

How to display this screen: Select Integration Offers for a ChannelAdvisor account on the Work with ChannelAdvisor Accounts Screen.

Field	Description
Account	The account ID assigned by ChannelAdvisor for your account. Upper and lower case. This ID is a GUID (globally unique identifier), as set up through the Create ChannelAdvisor Account Screen. *Alphanumeric, 50 positions; optional.*
Description	The description of your ChannelAdvisor account, as set up through the Create ChannelAdvisor Account Screen. *Alphanumeric, 30 positions; optional.*
Offer	The offer that controls pricing for ChannelAdvisor. You send pricing information to ChannelAdvisor through the CAPRICE periodic function. This offer should match the ChannelAdvisor SKU X-Ref Offer (L92). *Alphanumeric, 3 positions; optional.*
Price Output	The label of the third price included in the price extract file by the CAPRICE periodic function. Upper and lower case. From the SKU Price, if any, for the specified offer; otherwise, from the Item Price for the specified offer. If there is no SKU Price or Offer Price for an item/SKU, this field is blank in the price file. *Alphanumeric, 30 positions; optional.*

Option	Procedure
Create a Channeladvisor offer	Select Create to advance to the Create ChannelAdvisor Offer Screen.
Change a Channeladvisor offer	Select Change for a Channeladvisor offer to advance to the Change ChannelAdvisor Offer screen. See the Create ChannelAdvisor Offer Screen for a description of the fields on this screen.

Create ChannelAdvisor Offer Screen

Purpose: Use this screen to set up the offer you use to control pricing for the ChannelAdvisor integration, including the label for the ChannelAdvisor offer price. You send pricing information to ChannelAdvisor through the CAPRICE periodic function. This offer should match the ChannelAdvisor SKU X-Ref Offer (L92).

Background: SeeChannelAdvisor Integration Overview for background on the ChannelAdvisor integration, especially Sending Current Prices to ChannelAdvisor.

How to display this screen: Select Create at the Work with ChannelAdvisor Offers Screen.

Field	Description
Account	The account ID assigned by ChannelAdvisor for your account. Upper and lower case. This ID is a GUID (globally unique identifier), as set up through the Create ChannelAdvisor Account Screen. *Alphanumeric, 50 positions; display-only.*
Description	The description of your ChannelAdvisor account, as set up through the Create ChannelAdvisor Account Screen. *Alphanumeric, 30 positions; display-only.*
Offer	The offer that controls pricing for ChannelAdvisor. You send pricing information to ChannelAdvisor through the CAPRICE periodic function. This offer should match the ChannelAdvisor SKU X-Ref Offer (L92). *Alphanumeric, 3 positions.* *Create screen: required.* *Change screen: display-only.*
Price output	The field label of the third price included in the price extract file by the CAPRICE periodic function. Upper and lower case. From the SKU Price, if any, for the specified offer; otherwise, from the Item Price for the specified offer. If there is no SKU Price or Offer Price for an item/SKU, this field is blank in the price file. *Alphanumeric, 30 positions; required.*

Merchandising Integration

Topics in this part: The following topics describe the integration between Order Administration and Oracle Retail merchandising applications.

- Oracle Retail Merchandising Foundation Cloud Service (RMFCS) and Oracle Retail Pricing Cloud Service (RPCS) Integration: Provides information on importing items and pricing from Oracle Retail Merchandising Foundation Cloud Service (RMFCS) and from Oracle Retail Pricing Cloud Service (RPCS).

> **Note:**
>
> This integration will be deprecated in a future release. Importing Enterprise Foundation Data through Omnichannel Cloud Data Service (OCDS) can be used instead to import items and pricing.

- Integration with the Sales Audit Module of the Oracle Retail Merchandising Foundation Cloud Service; Provides information on transmitting sales and returns information to the Sales Audit module of the Oracle Retail Merchandising Foundation Cloud Service, details on the information mapped, and the setup required to support the integration.
- Importing Enterprise Foundation Data through Omnichannel Cloud Data Service (OCDS): Provides information on importing enterprise foundation data, including items, prices, merchandise hierarchy, and item images from other retail applications through Oracle Omnichannel Cloud Data Service (OCDS).
- Enterprise Order Integration (Future Receipts and Active PO/Pre-Order Processing): Provides information on importing future availability information for pre-orders, processing updates as pre-order items become available, and controlling the submission of these orders to Order Orchestration.

Print User Security Audit Reports (PUSA)

Purpose: Use this option to generate a report of:

- changes to users, user classes, and secured features, or
- users with changed passwords, or
- both

You need to specify a date range for the reports, and have the option of restricting the user authority change report to a specific user or to updates for a particular table. Only administrative users should have authority to generate these reports.

> **Note:**
>
> Not all activity tracked in the User Audit table is included on the generated reports. See Tracking User, Authority, and Password Updates for background.

Print Security Audit Reports Screen

How to display this screen: Enter PUSA in the *Fast path* field at the top of any menu, or select Print User Security Audit Reports from a menu.

Field	Description
Start date	The first date to include on the User Authority Change Report and Password Change Report. *Numeric, 6 positions (user date format); required.*

Field	Description
End date	The last date to include on the User Authority Change Report and Password Change Report. The end date must be on or after the start date. *Numeric, 6 positions (user date format); required.*
User authority changes	Select this option to generate the ’User Authority Change Report.
Password changes	Select this option to generate the Password Change Report. No data is created for this report when you use Oracle Identity Cloud Service for password authentication.
User	Enter a valid user ID to restrict the User Authority Change Report to activity related to that user. Only updates to tables whose Authority changed matches the specified user ID can be included. This field does not affect the results included on the Password Change Report. *Alphanumeric, 10 positions; optional.*

Field	Description
Table	Select a table from the drop-down list to restrict the User Authority Change Report to activity for that table. Options and corresponding tables are: • Authorized User Class Company: Auth User Class Company • Authorized User Class Feature: Auth User Class Feature • Authorized User Class Option: Auth User Class Option • Authorized User Company: Auth User Company • Authorized User Feature: Auth User Feature • Authorized User Menu Option: Auth User Menu Option • External Authorization Service: External Auth Service • Secured Feature: Secured Feature • Usr: User • User Class: User Class • User Class Field Authority: User Class Field Auth • User Class Vendor Authority: User Class Vend Auth • User Extended: User Extended • User Field Authority: User Field Authority • User Tickler Group: User Tickler Group • Users: Users **Note:** • This field does not affect the results included on the Password Change Report. • The Active Procedure table is not available for selection, and these records are not included on the report if you generate it without selecting a specific table. • If you also specify a User for the User Authority Change Report, the screen does not verify that the selected table includes user updates rather than updates related to user class or secured feature. For example, if you specify a user ID and also select the User Class Field Authority table, the User Authority Change Report will not include any results, because the User Class Field Authority table is not related to user updates. Only updates to tables whose Authority changed is a user ID can be included when you generate the report for a specified user.

Completing this screen:

- Complete the *Start date* and *End date*.
- Select either *User authority changes* to generate the User Authority Change Report, *Password changes* to generate the Password Change Report, or both options.
- Optionally, specify a *User* or a *Table* to restrict the results on the User Authority Change Report to activity for your selections.
- Select OK to validate your entries.

Completing this screen: Select Submit.

Order Volume Report (OVOL)

Purpose: Use this menu option to generate the Order Count report, which provides the total number of orders entered in Order Administration broken out by company, and optionally, order type for a specified date range.

Order Count Report Screen

Use this screen to specify the criteria used to generate the Order Count report.

Field	Description
From...To	The date range you wish to use to generate the Order Count report. The system totals the number of orders entered within this date range for each Order Administration company. *Numeric, 6 positions (user date format); required.*
Sort by order type	Select this field to generate the Order Count Report by Order Type, which provide a break out of the total number of orders entered for a company by order type. Deselect this field to generate the Order Count Report, which provides an order count for each company across all order types. *Optional.*

Screen Option	Procedure
Generate the Order Count Report or Order Count Report by Order Type	Select Submit to generate the report.

To generate the report:

1. Enter the date range you wish to use to generate the Order Count report in the *From* and *To* fields.
2. Select the *Sort by order type* field to generate the Order Count Report by Order Type, which provides a break out of the total number of orders entered for each company by order type; otherwise, deselect this field to generate the Order Count Report, which provides an order count for each company across all order types.
3. Select OK to validate your entries.
4. Select Submit to generate the Order Count report.
   - If you did not select the *Sort by order type* field, the system generates the Order Count Report, which provides the total number of orders entered in Order Administration broken out by company for a specified date range.

- If you selected the *Sort by order type* field, the system generates the Order Count Report by Order Type, which provides the total number of orders entered in Order Administration broken out by order type within company for a specified date range.

Process New Secured Features (NSEC)

Purpose: Use the Process New Secure Features option to create new secure features in each company in your environment, and define the default settings for each.

Prompting to process new secure features: When a new update that includes one or more new secure features is applied to your environment, a window prompts you to use this option. The prompt occurs for the first user to log in after the update was applied, and is no longer displayed once a user has worked through the new secure features for all companies.

You can also use this option on demand to process new secure features by selecting Process New Secure Features or entering NSEC in the *Fast path* field.

> **Note:**
>
> Oracle recommends that you process new secure features when they are added through an update, to prevent inconsistent results if a new secure feature has not been created for a company.

How to process new secure features: When you select this option, the Change Secure Feature screen opens for each new secure feature in each existing company in your environment. Each time the screen opens, the user can select the setting for the new secure feature, or exit to set the secured feature to its default value.

When you select this option, an error message indicates if there are no new secure features.

Process New System Control Values (NSCV)

Purpose: Use the Process New System Control Values option to create new system control values in each company in your environment, and define the default settings for each.

Prompting to process new system control values: When a new update that includes one or more new system control values is applied to your environment, a window prompts you to use this option. The prompt occurs for the first user to log in after the update was applied, and is no longer displayed once a user has worked through the new system control values for all companies.

You can also use this option on demand to process new system control values by selecting Process New System Control Values or entering NSCV in the *Fast path* field.

> **Note:**
>
> Oracle recommends that you process new system control values when they are added through an update, to prevent inconsistent results if a new system control value has not been created for a company.

How to process new system control values: When you select this option, the Change System Control Value screen opens for each new system control value in each existing company in your environment. Each time the screen opens, the user can select the setting for the new system control value, or exit to set the system control value to its default value.

When you select this option, an error message indicates if there are no new system control values.

Work with Warehouse Drop Point (WWDP)

Purpose: This menu option is the same as EWDP; see Editing Warehouse Drop Points (EWDP) for more information.

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Performing Inventory Transactions

Topics in this part: This part describes how to perform inventory transactions.

- Working with Inventory Transactions (WITI) tells you how to perform transactions which change inventory immediately.
- Working with Inventory Transaction Errors (WITE) allows you to review all of the errors that have occurred while performing inventory transactions.
- Finished Good Work Order Processing (WWOR) allows you to reserve component items while you assemble a finished good.

Working with Inventory Transactions (WITI)

Purpose: Use the Work with Inventory Transactions/Immediate menu option to enter transactions that should update inventory immediately. While your company can create additional transaction types, inventory transactions typically include:

- Adjusting an item quantity (such as the on-hand balance, because the item has been damaged)
- Returning an item to the vendor
- Transferring items between warehouses
- Transferring items between locations
- Converting inventory for an existing item to a different existing item
- Increasing the quantity of a finished good and decreasing the quantity of its component parts

Inventory transaction codes and reasons: There are two types of codes used during inventory transactions: inventory transaction codes and inventory transaction reason codes. Both are created by your System Administrator according to your company's needs.

Inventory Transaction codes tell the system:

- whether the transaction has a positive (+) or negative (-) effect on inventory
- the General Ledger account number to updated as a result of this transaction
- whether a reason code is required

Certain inventory transaction codes that are delivered with the system are available for batch inventory transactions. You can also create your own codes. You cannot delete the system-delivered codes; however, you can change the General Ledger account associated with a code, or whether a reason code is required.

The table below lists the system-supplied codes.

Code	Description	Effect on Inventory Levels
A	Adjustment	Increases on-hand if you enter a positive quantity. Decreases on-hand amount if you enter a negative quantity.
G	Item to Item Transfer	Increases on-hand amount of the target item. Decreases on-hand amount of the source item.
M	Make Up Set	Increases on-hand amount for the finished good item. Decreases on-hand amount for the components.
T	Transfer	Increases on-hand amount in the target warehouse/ location. Decreases on-hand amount in the source warehouse/ location.
V	Return to Vendor	Decreases on-hand amount if you enter a positive quantity. Increases on-hand amount if you enter a negative quantity.
O	On Hand	Overrides on-hand amount to the amount you entered.

Transaction reason codes describe why a specific transaction is being performed. You can establish these codes through the Work with Inventory Transaction Reasons menu option. You can specify whether a reason is required for each inventory transaction type.

In this topic:

- Work with Inventory Transactions Screen
- Enter To Location Window (Inventory Transfers)
- Warehouse Selection Screen
- Select Item Location Screen
- Item to Item Transfers Window
- Transfer Item's Primary Location Screen
  - Pick Locations Exist Window
- Create Item Location for Transfer Screen
- Perform Location Transfer - Non Primary Screen
- Perform Whs to Whs Location Transfer - Non Primary Screen

Work with Inventory Transactions Screen

Purpose: Use this screen to update inventory immediately.

How to display this screen: Enter WITI in the *Fast path* field at the top of any menu or select Work with Inventory Transactions/Immediate from a menu.

Field	Description
Code	A code to identify the type of transaction. These codes are validated against the Inventory Transaction Code table. You can define your own codes in addition to using the following system-supplied codes: • A = Adjustment • G = Item to item transfer • T = Transfer • V = Return to vendor • O = On-hand *Alphanumeric, 1 position, required.*
Item	A code for a unit of inventory. Item codes are defined in and validated against the Item table. *Alphanumeric, 12 positions; optional.*
Item description (Unlabeled field below the item)	The description associated with the item. This field is included if the Display Item Description (D45) system control value is selected. *Alphanumeric, 120 positions; display-only.*
SKU (Stock keeping unit)	The item's unique characteristics, such as its size and color. SKU codes are defined in and validated against the SKU table. *Alphanumeric, three 4-position fields; required if the item has SKU's.*
Quantity	The amount of inventory that this transaction affects. For adjustments (A code), you can enter a negative or positive quantity. To enter a negative quantity, enter the minus sign before the quantity. **Note:** You cannot enter a transaction that will make the on-hand quantity negative. *Numeric, 8 positions; required.*
Whs (Warehouse)	A code for the warehouse that contains the item. Warehouse codes are defined in and validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS). *Numeric, 3 positions, required.*

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Location</td><td>The code for the area within the warehouse that contains the item.
The location code is validated against the Location table and the Item Location table. If the item location specified does not exist, you can create it by selecting Create Loc and advancing to the Create Item Location Screen.
Select OK to display a default location, determined by the following system control values:
• Default Primary Location (C05): defines whether the primary location from the SKU table defaults.
• Default Primary Location from an Item Warehouse (G06): defines whether a primary location for the item in the specified warehouse defaults; in this case the system will default the first primary location, in alphanumeric order, for the item in the specified warehouse.
• If both system control values are selected, the item warehouse location for the receiving warehouse will override the item's primary location from the SKU table.
If the system cannot find a primary location for an item in the specified warehouse, the following message indicates:
<code>No Default Location was found. Please enter a Location.</code>
The following message indicates that you entered a location whose location class does not match the location class for the item and the Allow Location Class Edit in Inventory Transaction (F86) system control value is selected:
<code>Item is not compatible with location.</code>
Click on the arrow in the field to display item location information for the item in the warehouse you have specified in the Warehouse field:
Typically the location code is composed of a single alphanumeric character for Zone, and two numbers each for Aisle, Shelf, and Bin. For instance, the location A010201 indicates:
<code>Zone Aisle Shelf Bin</code>
<code>A 01 02 01</code>
Alphanumeric, 7 positions; required.</td></tr>
<tr><td>Reason</td><td>A code that represents a reason to perform an inventory transaction. These codes are defined in and validated against the Transaction Reason Code table. The reason could be damaged, inventory miscount, etc.
The reason code will be required if you are using an inventory transaction code with the Reason required field selected.
Numeric, 2 positions; may be required depending on the type of transaction.</td></tr>
</table>

Field	Description
ID#	The identification number or text associated with this inventory transaction record. This number appears in Item Transaction History. **Note:** The system assigns an ID number for item to item transfers (transaction code = G); you cannot enter any information in this field for this transaction type. If you accept a transaction (select OK) with an ID # specified, the number or text defaults for the following transactions, but you can override it. *Alphanumeric, 10 positions; optional.*
PO#	The system validates that the item for the transaction appears on the purchase order whose number you enter; otherwise, it displays an error message. You can enter a purchase order number only for an adjustment (A) transaction, and only if you have the proper authority. Authority to this field is controlled by the Allow Entry of PO Number in Inventory Transactions (A86) secured feature. *Numeric, 7 positions; optional.*
On Hand	
Old	The quantity of the item in this warehouse and location before processing the transaction. *Numeric, 7 positions; display-only.*
New	The quantity of the item in this warehouse and location after processing the transaction. *Numeric, 7 positions; display-only.*

Instructions:

1. Complete the necessary fields. If the designated location does not exist, the system prompts you to create it by selecting Create Loc.
2. When completing the process, the transaction you entered is indicated on this screen. Inventory has been updated in the item/warehouse and item/location records. You can perform another inventory transaction or select Exit to return to the previous screen.

> **Note:**
>
> When performing an inventory transaction with a G, M, or T transaction code, at least two transactions are performed: a transaction for the "from" location and a transaction for the "to" location. See Display Inventory Transaction History (DITH).

Code	Description	Inventory Transaction process
A	Adjustment	The transaction is indicated on this screen.
G	Item to Item Transfer	You advance to the Item to Item Transfers Window.
M	Make Up Set	You advance to the Work with Kit Makeup Screen. If you want to take a component item out of more than one location, you advance to the Create Kit Makeup Location Screen.
T	Transfer	You advance to the Enter To Location Window (Inventory Transfers). You advance to the Warehouse Selection Screen if you need to select an item warehouse, or the Select Item Location Screen if you need to select an item location. You advance to the Create Item Location for Transfer Screen if you need to create an item location.
V	Return to Vendor	The transaction is indicated on this screen.
O	On-hand	The transaction is indicated on this screen.

Serial numbers: If the transaction affects the total on-hand quantity for a serial numbered item in your warehouse, you advance to the Enter Serial Number screen.

Screen Option	Procedure
Create an item location if there is no record of the item in the designated location	Select Create Loc to advance to the Create Item Location Screen. This option is available only after you have attempted to enter a transaction and the system has displayed an error message such as `Location (PRIM2 ) specified for this item does not exist; click "Create Loc" button to create.`
Change an item's primary location	Select Primary Transfers to advance to the Transfer Item's Primary Location Screen.
Transfer all of the items in one non-primary location to another non-primary location	Select Location Transfers to advance to the Perform Location Transfer - Non Primary Screen.

Enter To Location Window (Inventory Transfers)

Purpose: Use this window to enter a target location when you process an inventory transfer (inventory transaction code = T).

How to display this screen: Enter valid information for an inventory transfer at the Work with Inventory Transactions Screen.

Completing this window:

1. Enter the code of an alternate company in the company (Cmp) field if you are working in a multi-company environment and are transferring stock to another company. The company code is a three-position, numeric field, defined in the company table; the code of your current company defaults in this field. See Working with Companies (WCMP).

2. Enter the code of the target warehouse and location. See Work with Inventory Transactions Screen for field descriptions.
   - You can prompt on the *Warehouse* field to advance to the Warehouse Selection Screen, where you can select an existing item warehouse or create a new item warehouse record.
   - You can prompt on the *Location* field to advance to the Select Item Location Screen, where you can select an existing item location. If you would like to create a new item location record, enter the location code in the *Location* field and select OK to advance to the Create Item Location for Transfer Screen, where you can create the item location record.
3. Select OK.
   - If you did not define a warehouse, the system advances you to the Warehouse Selection Screen, where you can select an item warehouse or create a new item warehouse record.
   - If you did not define a location, the system advances you to the Select Item Location Screen, where you can select an existing item location. If you would like to create a new item location record, enter the location code in the *Location* field and select OK to advance to the Create Item Location for Transfer Screen, where you can create the item location record.

The system processes the transfer and returns to the Work with Inventory Transactions Screen. The transfer you just entered appears on the screen.

Serial numbers: If the transfer affects the total on-hand quantity for a serial numbered item in a warehouse, you advance to the Enter Serial Number screen.

Warehouse Selection Screen

Purpose: Use this screen to select the warehouse that carries the item displayed on the "To" Location pop-up window when you process an inventory transfer (transaction code = T).

How to display this screen: At the Enter To Location Window (Inventory Transfers), prompt on the *Warehouse* field or select OK before completing the *Warehouse* field.

Field	Description
Item	A code representing the unit of inventory to transfer. *Alphanumeric, 12 positions; display-only.*
SKU (Stock keeping unit)	The item's unique characteristics, such as its size and color. SKU codes are defined in and validated against the SKU table. *Alphanumeric, three 4-position fields; display-only.*
Whs (Warehouse)	A code for the warehouse that contains the item. Two warehouse fields display on this screen; the first one is for scanning and the second one is display-only. *Numeric, 3 positions; display-only.*
Name (Warehouse name)	The description of the warehouse that contains the item. *Alphanumeric; 30 positions; display-only.*
On hand	The number of units of the item across all locations in the warehouse. *Numeric, 7 positions; display-only.*
Available	The quantity of the item that is available to sell. *Numeric, 5 positions; display-only.*

Field	Description
Pickable	The total quantity of pickable stock in the warehouse. *Numeric, 7 positions; display-only.*
On order	The total quantity of the item in the warehouse that is due to be received on open purchase orders. *Numeric, 7 positions; display-only.*

Completing this screen: Select a warehouse. You return to the Enter To Location Window (Inventory Transfers), where the warehouse you selected defaults.

Screen Option	Procedure
Create an item warehouse	Select Create to advance to the Create Item Location Screen.

Select Item Location Screen

Purpose: Use this screen to select the location where you wish to transfer an item when you process an inventory transfer (transaction code = T).

How to display this screen: At the Enter To Location Window (Inventory Transfers), prompt on the *Location* field or select OK before completing the *Location* field.

Field	Description
Item	A code representing the unit of inventory to transfer. *Alphanumeric, 12 positions; display-only.*
SKU (Stock keeping unit)	The item's unique characteristics, such as its size and color. SKU codes are defined in and validated against the SKU table. *Alphanumeric, three 4-position fields; display-only.*
Whs (Warehouse)	A code for the warehouse specified on the Enter To Location Window (Inventory Transfers). *Numeric, 3 positions; display-only.*
Location	A code for an area within the warehouse that contains the item or item SKU. Two location fields display on this screen; the first one is for scanning and the second one is display-only. The following message indicates that you selected a location whose location class does not match the location class for the item and the Allow Location Class Edit in Inventory Transaction (F86) system control value is selected: `Item is not compatible with Location.` The location code is composed of a single alphanumeric character for Zone, and two numbers each for Aisle, Shelf, and Bin. For example, the location A010203 indicates: `Zone Aisle Shelf Bin` `A 01 02 03` *Alphanumeric, 7 positions; optional.*

Field	Description
Pickable	Indicates whether inventory can be picked from this location to fulfill an order. Valid values are: • YES = pickable • NO = non-pickable
Zone	Identifies the area in the warehouse where the location is situated. *Alphanumeric, 1 position; display-only.*
Aisle	Identifies the aisle within the warehouse location. *Numeric, 2 positions; display-only.*
Shelf	Identifies the location's shelf number within the aisle. *Numeric, 2 positions; display-only.*
Bin #	This code identifies the location's bin number on the shelf. *Numeric, 2 positions; display-only.*
Freeze (Reservation freeze flag)	Indicates whether the item location or SKU location is frozen. Valid values are: • YES = The item/SKU location is frozen. • NO = The item/SKU location is not frozen. If a location is frozen, Pick Slip Generation does not print picks. See Performing Pick Slip Generation. **Note:** Even though a pick slip does not print for an item from a frozen item location, the system still reserves the item on the Order Lines Fields in Order Entry.
Available	The quantity of the item that is available to sell. This field is not currently implemented. *Numeric, 5 positions; display-only.*

How to use this screen: Select a location. You return to the Enter To Location Window (Inventory Transfers) with the location you have selected displayed.

If you wish to create a new item location, do not select a location at this screen; instead, return to the Enter To Location Window (Inventory Transfers) and enter the new location in the *Location* field. When you select OK, the system advances you to the Create Item Location for Transfer Screen.

Item to Item Transfers Window

Purpose: Use this window to enter target item information when you process an item to item transfer (inventory transaction code = G).

An item to item transfer converts inventory for an existing item, in the quantity you specify, to a different existing item. You might want to process an item to item transfer if you will discontinue offering an item on its own, and sell it only as part of a grab bag instead.

How to display this screen: Enter valid information for an item to item transfer at the Work with Inventory Transactions Screen.

Soldout control code: Each field on this window except the *Soldout control* code is described under Work with Inventory Transactions Screen. The system uses the soldout control code if, as a result of processing this transfer, the source item will be sold out. If the Default Soldout Control Code for Item to Item Transactions (D94) system control value is not blank, the value appears here. The soldout control code is a 2-position, alphanumeric code; see Working with Soldout Controls (WSLD).

List price and changing quantity: The system requires that the list price of the source and target item be identical for item to item transactions. The list price is defined in the SKU table for SKUed items, and displayed on the second base item screen for non-SKUed items. See Performing Initial Item Entry (MITM).

If the quantity of the source and target items are different, you must select Change at the pop-up window to change the quantity of the target item. The *Quantity* field appears below the *Warehouse* field; this is a numeric, 8-position field.

The system will consider the relationship between the source item quantity and the target item quantity when validating that the list prices are the same. In the following example, a target item would constitute a set of three of the source item.

Source item	Target item
quantity = 150	quantity = 50
list price = $3.00	list price = $1.00

The system divides $3.00 by 3 and confirms that the list price of the target item is $1.00.

If the list prices are not identical, the following message indicates:

```
List prices, qtys of "From" and "To" item do not match.
```

Completing this window: Complete the necessary fields on this window. The system processes the transfer and returns to the Work with Inventory Transactions Screen, where the transfer you just entered appears.

Transfer Item’s Primary Location Screen

Purpose: Use this screen to transfer an existing item's primary location when you process an inventory transfer (inventory transaction code = T). The system requires that an item/location exist before you can perform this transaction.

The location you are transferring the item to becomes the item's “primary primary” location. A “primary primary” location is the first primary location the system searches when performing any action dealing with inventory. The “primary primary” location is stored in the Primary location field in the SKU table.

When you complete this screen, the system:

- updates the “primary primary” location in the SKU table.
- moves all the inventory from the original location to the new location.

How to display this screen: Select Primary Transfers at the Work with Inventory Transactions Screen.

Field	Description
Item	A code for a unit of inventory. Item codes are defined in and validated against the Item table. *Alphanumeric, 12 positions; required.*
SKU (Stock keeping unit)	The item's unique characteristics, such as its size and color. SKU codes are defined and validated against the SKU table. *Alphanumeric, three 4-position fields; required if the item has SKUs.*
Warehouse	A code for the warehouse that contains the item. Warehouse codes are defined in and validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS). *Numeric, 3 positions; required.*
Transfer from location	The original location within the warehouse that the item is taken from. If you enter a location other than the item's "primary primary," the system does not perform the transfer and displays an error message: Location not Primary for item. *Alphanumeric, 7 positions; required.*
Transfer to location	The location within the warehouse that the item will be transferred to. This location becomes the "primary primary" location for this item. *Alphanumeric, 7 positions; required.*
Transfer reason	A code that represents a reason to perform an inventory transaction. These codes are defined in and validated against the Transaction Reason Code table. The reason code will be required if you are using an inventory transaction code with the *Reason required* field selected. *Numeric, 2 positions; may be required depending on the type of transaction.*
Delete "from" location	Indicates whether or not to delete location the item's from location. Valid values are: • Selected = the system will delete the item/location • Unselected = the system will not delete the item/location **Note:** If the "from" location is not deleted, the item will have multiple primary locations. In order to have multiple primary locations, you must have the Allow Multiple Primary Item Locations (D12) system control value set to CONFIRM or ALLOW.

Pick Locations Exist Window

A pop-up window appears automatically when you select OK to perform a location transfer if printed pick slips exist for the "from" location:

To continue the transfer, select the *Continue* field, or deselect the *Continue* field to perform the location transfer at a later time when the pick slips are confirmed.

If you enter a location that has not been assigned this item, the system brings you to the Create Item Location for Transfer Screen.

Create Item Location for Transfer Screen

Purpose: Use this screen to create an item location.

How to display this screen:

- Enter a new location for an item on the Transfer Item's Primary Location Screen.
- Enter a new location for an item on the Enter To Location Window (Inventory Transfers).

Field	Description
Reservation Freeze (Freeze flag)	Indicates whether the item location or SKU location is frozen. Valid values are: • Selected = The item/SKU location is frozen. • Unselected = The item/SKU location is not frozen. If a location is frozen, Pick Slip Generation does not print picks. See Performing Pick Slip Generation. **Note:** Even though a pick slip does not print for an item from a frozen item location, the system still reserves the item on the Order Lines Fields in Order Entry.
Min qty	The minimum amount of stock for this item or SKU that can be kept in this location. You should perform an inventory transaction or restock procedure when the inventory reaches the minimum level. *Numeric, 7 positions; optional.*
Max qty	The maximum amount of stock for this item or SKU that can be kept in this location. *Numeric, 7 positions; optional.*

Completing this screen: When you return to the Work with Inventory Transactions Screen, all previous transactions are cleared from the screen.

Perform Location Transfer - Non Primary Screen

Purpose: Use this screen to transfer all of the items in a non-primary location to another non-primary location.

The non-primary location transfer process transfers the on-hand quantity for all item locations in the specified *Transfer From Location* to the *Transfer To Location*. If the item location does not already exist in the *Transfer To Location*, the system creates it. If the item location already exists in the *Transfer To Location*, the system adds the on-hand quantity to transfer to the existing item location. You can review each item location transfer in Display Inventory Transaction History (DITH).

In order to complete a non-primary location transfer:

- inventory sharing must not be turned on for the warehouse where the non-primary location transfer will take place (the *Sharing warehouse* field for the warehouse must be unselected and the *Shared company* and *Shared warehouse* fields for the warehouse must be blank).
- the *Transfer From Location* and *Transfer To Location* must be non-primary locations (the *Location type* for the location must not be P Primary) in the warehouse specified. See Transfer Item's Primary Location Screen to transfer an existing item's primary location.
- items must exist in the *Transfer From Location*. The item locations for the *Transfer From Location*:
  - must have an on-hand quantity to transfer.
  - must have a 0 printed quantity.
  - must have a 0 pending quantity.
- the *Transfer From Location* and *Transfer To Location* cannot be the same location.
- if the Allow Location Class Edit in Inventory Transaction (F86) system control value is selected, the item's location class must match the *Transfer To Location's* location class.

How to display this screen: Select Location Transfers at the Work with Inventory Transactions Screen.

Field	Description
Warehouse	A code for the warehouse where the location transfer will take place. Warehouse codes are defined in and validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS). The system does not perform the transfer and displays an error message if the warehouse shares inventory with a warehouse in a different company: `Cannot transfer to a whs (111) which shares inventory with another whs (222).` *Numeric, 3 positions; required.*

Field	Description
Transfer From Location	The original location within the warehouse that the items are taken from. Location codes are defined in and validated against the Location table; see Creating and Maintaining Locations (WLOC). The system does not perform the transfer and displays an error message if: • the location is a primary location: `Location (B010101) is a primary location. Transfer not allowed using this function`. Use the Transfer Item's Primary Location Screen to transfer an existing item's primary location. • no items exist in the *Transfer From Location* with an on-hand quantity to transfer: `No items to transfer from B010101 to B020202`. • a printed quantity exists for one or more item locations: `Printed quantity exists against one or more item locations for location B010101`. • a pending quantity exists for one or more item locations: `Pending quantity exists against one or more item locations for location B010101`. • the *Transfer From Location* and *Transfer To Location* are the same location: `The From location and To location must not be the same`. *Alphanumeric, 7 positions; required.*
Transfer To Location	The location within the warehouse where the items will be transferred to. Location codes are defined in and validated against the Location table; see Creating and Maintaining Locations (WLOC). The system does not perform the transfer and displays an error message if: • the location is a primary location: `Location (A010101) is a primary location. Transfer not allowed using this function`. Use the Transfer Item's Primary Location Screen to transfer an existing item's primary location. • the Allow Location Class Edit in Inventory Transaction (F86) system control value is selected and the item's location class does not match the *Transfer To Location's* location class: `One or more items is not compatible with location (B010101)`. • the *Transfer From Location* and *Transfer To Location* are the same location: `The From location and To location must not be the same`. *Alphanumeric, 7 positions; required.*

Field	Description
Transaction Reason	A code that represents the reason to perform the inventory transaction. Inventory transaction reason codes are defined in and validated against the Transaction Reason Code table; see Work with Inventory Transaction Reason Codes (WIT1). A transaction reason code is required if the *Reason required* field for the T Transfer inventory transaction code is selected. *Numeric, 2 positions; required if the Reason required field for the T Transfer code is selected.*

Completing this screen:

1. In the Warehouse field, enter the warehouse code where the non-primary location transfer will take place.
2. In the Transfer From Location field, enter the non-primary location where the items will be transferred from.
3. In the Transfer To Location field, enter the non-primary location where the items will be transferred to.
4. In the Transaction Reason field, enter the reason for the non-primary location transfer.
5. Select OK to validate your entries. If necessary, correct any errors and select OK again.
6. If no errors are found, the system displays a Confirm Transfer window. Select OK to confirm the transfer; otherwise, select Exit to cancel. If you select OK and:
    - there are less than 50 item locations to transfer, the system interactively completes the non-primary location transfer and displays the message `Transfer from B010101 to B020202 complete`.
    - If there are 50 or more item locations to transfer, a Large Transfer Warning window displays with the message: `50 or more items exist to be transferred. Process will be submitted to batch` . When you select OK on this window, the system submits the non-primary location transfer as a batch job and displays the message `Job (LOC_TRANS) has been submitted to batch`. You can review the LOC_TRANS batch job on the Job Management (My Jobs) screen.

The non-primary location transfer process:

- Transfers the on-hand quantity for all item locations in the specified *Transfer From Location* to the *Transfer To Location*.
- Deletes the *from* item location records.
- If the item location does not already exist in the *Transfer To Location*, the system creates it.
- If the item location already exists in the *Transfer To Location*, the system adds the on-hand quantity to transfer to the existing item location.
- If serial numbers are associated with the *Transfer From Location*, the system does NOT update the serial numbers to use the new *Transfer To Location*.

You can review each item location transfer in Display Inventory Transaction History (DITH).

Perform Whs to Whs Location Transfer - Non Primary Screen

Purpose: Use this screen to transfer all of the items in a non-primary location to another non-primary location. The two locations can be in different warehouses, although they do not need to be.

When you use this screen, the system transfers the on-hand quantity for all item locations in the specified *Transfer From Warehouse* and *Transfer From Location* to the specified *Transfer To Warehouse* and *Transfer To Location*. If the item warehouse and item location do not already exist in the *Transfer To Warehouse* and *Transfer To Location*, the system creates them. If the item location already exists in the *Transfer To Location*, the system adds the on-hand quantity being transferred to the existing item location. You can review each transfer in Display Inventory Transaction History (DITH).

In order to complete a non-primary warehouse-to-warehouse location transfer:

- the *Transfer From Location* and *Transfer To Location* must be non-primary locations (the *Location type* for the location must not be P Primary). See Transfer Item's Primary Location Screen for information on how to transfer an existing item's primary location.
- there must be at least one item location in the *Transfer From Warehouse* and *Transfer From Location*. The item locations for the *Transfer From Location*:
  - must have an on-hand quantity to transfer.
  - must have a 0 printed quantity.
  - must have a 0 pending quantity.
- the *Transfer From Location* and *Transfer To Location* cannot be the same location in the same warehouse.
- if the Allow Location Class Edit in Inventory Transaction (F86) system control value is selected, the item's location class must match the *Transfer To Location's* location class.

How to display this screen: Select Warehouse Transfers at the Work with Inventory Transactions Screen.

Field	Description
Transfer From Warehouse	A code for the warehouse associated with the *Transfer from Location*. Can be the same as the Transfer To Warehouse. Warehouse codes are defined in and validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS). *Numeric, 3 positions; required.*

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Transfer From Location</td><td>The original location within the Transfer From Warehouse where the items are currently stored.
Location codes are defined in and validated against the Location table; see Creating and Maintaining Locations (WLOC).
The system does not perform the transfer and displays an error message if:
• the location is a primary location: <code>Location (B010101) is a primary location. Transfer not allowed using this function</code>. Use the Transfer Item's Primary Location Screen to transfer an existing item's primary location.
• no items exist in the Transfer From Location with an on-hand quantity to transfer: <code>No items to transfer from B010101 to B020202</code>.
• a printed quantity exists for one or more item locations: <code>Printed quantity exists against one or more item locations for location B010101</code>.
• a pending quantity exists for one or more item locations: <code>Pending quantity exists against one or more item locations for location B010101</code>.
• the Transfer From Location and Transfer To Location are the same location in the same warehouse: <code>The From location and To location must not be the same</code>.
Alphanumeric, 7 positions; required.</td></tr>
<tr><td>Transfer To Warehouse</td><td>A code for the warehouse associated with the Transfer To Location. Can be the same as the Transfer From Warehouse.
Warehouse codes are defined in and validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS).
Numeric, 3 positions; required.</td></tr>
<tr><td>Transfer To Location</td><td>The location within Transfer To Warehouse where the items will be transferred to.
Location codes are defined in and validated against the Location table; see Creating and Maintaining Locations (WLOC).
The system does not perform the transfer and displays an error message if:
• the location is a primary location: <code>Location (A010101) is a primary location. Transfer not allowed using this function</code>. Use the Transfer Item's Primary Location Screen to transfer an existing item's primary location.
• the Allow Location Class Edit in Inventory Transaction (F86) system control value is selected and an item's location class does not match the Transfer To Location's location class: <code>One or more items is not compatible with location (B010101)</code>.
• the Transfer From Location and Transfer To Location are the same location in the same warehouse: <code>The From location and To location must not be the same</code>.
Alphanumeric, 7 positions; required.</td></tr>
</table>

Field	Description
Transaction Reason	A code that represents the reason to perform the inventory transaction. Inventory transaction reason codes are defined in and validated against the Transaction Reason Code table; see Work with Inventory Transaction Reason Codes (WIT1). A transaction reason code is required if the *Reason required* field for the T Transfer inventory transaction code is selected. *Numeric, 2 positions; required if the Reason required field for the T Transfer code is selected.*

Completing this screen:

1. In the Transfer From Warehouse field, enter the warehouse code identifying where the non-primary location transfer originates.
2. In the Transfer From Location field, enter the non-primary location where the items will be transferred from.
3. In the Transfer To Warehouse, enter the warehouse code identifying where the items will be transferred to.
4. In the Transfer To Location field, enter the non-primary location where the items will be transferred to.
5. In the Transaction Reason field, enter the reason for the non-primary location transfer.
6. Select OK to validate your entries. If necessary, correct any errors and select OK again.
7. If no errors are found, the Confirm Transfer window opens. Select OK to confirm the transfer; otherwise, select Exit to cancel. If you select OK and:
   - there are less than 50 item locations to transfer, the system interactively completes the non-primary location transfer and displays the message `Transfer from B010101 to B020202 complete`.
   - If there are 50 or more item locations to transfer, a Large Transfer Warning window opens with the message: `50 or more items exist to be transferred. Process will be submitted to batch`. When you select OK on this window, the system submits the non-primary location transfer as a batch job and displays the message `Job (LOC_TRANS) has been submitted to batch`. You can review the LOC_TRANS batch job on the Job Management (My Jobs) screen.

The non-primary warehouse location transfer process:

- Transfers the on-hand quantity for all item locations in the specified *Transfer From Warehouse* and *Transfer From Location* to the *Transfer To Warehouse* and *Transfer To Location*.
- Deletes the *From* item location records.
- If the item warehouse does not already exist in the *Transfer To Warehouse*, the system creates it.

- If the item location does not already exist in the *Transfer To Location*, the system creates it.
- If the item location already exists in the *Transfer To Location*, the system adds the on-hand quantity to transfer to the existing item location.
- If serial numbers are associated with the *Transfer From Location*, the system does NOT update the serial numbers to use the new *Transfer To Location*.

> **Note:**
>
> The process does not prevent you from performing the transfer regardless of whether the "from" warehouse or the "to" warehouse uses inventory sharing.

You can review each item location transfer in Display Inventory Transaction History (DITH).

Working with Inventory Transaction Errors (WITE)

Purpose: Use the Work with Inventory Transaction Errors function to review all of the errors that occurred while performing inventory transactions, either through processing within Order Management System (system errors) or through the generic inventory transaction upload.

How do system errors occur? Errors can occur when you enter transactions in batch mode or automated transaction mode, or through transactions the system performs, such as issuing or express billing items. The system, or the person performing an inventory transaction, can cause the errors if inventory levels in related tables become out of sync, such as when an interface performs an update before the transaction is complete.

For example, the system attempts to perform an issue transaction when you confirm shipment of an item. However, the on-hand quantity for the item/warehouse is less than the shipment quantity. In this situation, the system creates a "negative on hand" transaction error record.

Correcting system errors: You can reprocess "negative on hand" errors using this menu option, and complete the attempted inventory transaction. In the example above, you would first need to reset the on-hand quantity of the item through a purchase order receipt or adjustment inventory transaction before submitting the reprocess.

> **Note:**
>
> You cannot process inventory resets if there are any inventory transaction errors; you must first correct or delete all errors. See Working with Inventory Resets.

Generic upload errors: In addition to the errors that can occur within the system, either through batch or system transactions, the *Generic Inventory Transaction Upload* can generate errors based on invalid, inconsistent, or missing information provided in the uploaded message. Unlike with most system errors, you can normally correct and resubmit generic upload errors.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

In this topic:

- Work with Inventory Transaction Errors Screen
- Display Inventory Transaction Errors Screen
- Generic Interface Error Screen
- Reprocessing Transactions

Work with Inventory Transaction Errors Screen

Purpose: Use this screen to display all of the errors that have occurred during inventory transactions.

How to display this screen: Enter WITE in the *Fast path* field at the top of any menu or select this option from a menu.

Field	Description
I (Interface error)	Indicates whether the error resulted from invalid, inconsistent or missing information in a transaction received through the *Generic Inventory Transaction Upload*. Valid values are: • Y = generic inventory transaction upload error: When you select Change for this type of error, you advance to the Generic Interface Error Screen, where you can change information before resubmitting and processing the transaction. • N = error resulting from an interactive or system transaction: You cannot change information for the transaction. When you select Change for this type of error, the system displays an error message: `System generated transactions cannot be changed`. However, you can reprocess "negative on hand" errors using this menu option, and complete the attempted inventory transaction, if you have corrected the situation that produced the error. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). **Note:** Uploaded inventory transactions can have this flag unselected if the information in the upload was correct and complete, but a regular transaction error occurred once the upload was processed. For example, an upload error could have this flag unselected if the transaction would produce a "negative on hand" situation.
Date (Inventory transaction error date)	The date when the transaction error occurred. *Numeric, 6 positions (user date format); optional.*

Field	Description
Item	A code for a unit of inventory. Item codes are defined in and validated against the Item table. *Alphanumeric, 12 positions; optional.*
SKU (Stock keeping unit)	The item's unique characteristics, such as its size and color. SKU codes are defined in and validated against the SKU table. *Alphanumeric, three 4-position fields; display-only.*
Cde (Transaction code)	The inventory transaction code that was used when the error occurred. Valid values include: • A =Adjustment • C = Customer Return • E = Express Bill • G = Item to item transfer • I = Issue • T = Transfer • V = Return to vendor • O = On-hand • R = Receiving You can also create user-defined transaction codes. See Work with Inventory Transaction Codes (WITC). *Alphanumeric, 1 position; display-only.*
Qty (Quantity)	The number of units that this transaction error affects. *Numeric, 8 positions; display-only.*
Error (Inventory transaction error description)	A description of the transaction error that occurred. For example: `Negative On hand` See *Inventory Transaction Upload Errors* for information on the types of errors that can occur through the generic inventory transaction upload. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). *Alphanumeric, 25 positions; display-only.*

Screen Option	Procedure
Change an uploaded transaction or automated transaction	Select Change for an uploaded transaction or automated transaction to advance to the Generic Interface Error Screen. **Note:** You cannot change a transaction error that occurred through batch inventory transactions or system processing; instead, the system displays an error message: `System generated transactions cannot be changed`. See the I (Interface error) flag for more information.
Delete a transaction error	Select Delete for the error you want to delete.
Display a transaction error	Select Display for an error to advance to the Display Inventory Transaction Errors Screen for a system error, or the Generic Interface Error Screen for an generic upload error. See the I (Interface error) flag for more information.
Advance to inventory inquiry	Select Inv Inquiry for an error to advance to the Display Item/ Warehouse Information Screen.
Attempt to reprocess the inventory transaction	Select Reprocess for the error to reprocess it. See Reprocessing Transactions.
Advance to standard order inquiry	Select Order Inquiry for an error to advance to the Order Inquiry Header Screen or the Order Inquiry Detail Screen, depending on the setting of the Default Version for Order Inquiry (C34) system control value.
Advance to item transaction history	Select Item Transaction History to advance to the Inventory Transaction History Screen (1 of 2).
Attempt to reprocess all inventory transactions in error	Select Reprocess. See Reprocessing Transactions.
Delete all inventory transaction error records	Select Delete all. The system displays a confirmation window. If you confirm the deletion at this window, the system submits the job DLT_WITE, which deletes all transaction errors and produces a listing of each deleted error.

Display Inventory Transaction Errors Screen

Purpose: Use this screen to display a specific system transaction error.

How to display this screen: Select Display for a system inventory transaction error at the Work with Inventory Transaction Errors Screen.

> **Note:**
>
> When you select Display for a generic upload transaction error (the I (Interface error) flag is selected), you advance to the Generic Interface Error Screen.

Field	Description
Date (Inventory transaction error date)	The date when the transaction error occurred. *Numeric, 6 positions (user date format); display-only.*
Time (Inventory transaction error time)	The time when the inventory transaction error occurred. *Numeric, 6 positions (HHMMSS format); display-only.*
Transaction code (Inventory transaction code)	The code identifying the inventory transaction that was attempted when the transaction error occurred. *Alphanumeric, 1 position; display-only.*
Order #	The order, ship-to number, and shipment number, each separated by hyphens, associated with the transaction error. *Order number: numeric, 7 positions; display-only.* *Ship-to number: numeric, 3 positions; display-only.* *Shipment number: numeric, 3 positions; display-only.*
Invoice #	The invoice number identifying a shipment against an order, if the inventory transaction error occurred when attempting an issue transaction. *Numeric, 7 positions; display-only.*
Item#/SKU (Item number and stock keeping unit)	The unit of inventory and its unique characteristics that was affected by the transaction. *Item: Alphanumeric, 12 positions; display-only.* *SKU: Alphanumeric, three 4-position fields; display-only.*
Transaction qty (Transaction quantity)	The amount of inventory that this transaction error affects. *Numeric, 8 positions; display-only.*
From whs/location (From warehouse and location)	The original warehouse and location that the item was taken from. *Whs: Alphanumeric, 3 positions; display-only.* *Location: Alphanumeric, 7 positions; display-only.*
To cmp/whs/location (To company, warehouse and location)	The company, warehouse and location that the item was transferred to. *Cmp: Alphanumeric, 3 positions; display-only.* *Whs: Alphanumeric, 3 positions; display-only.* *Location: Alphanumeric, 7 positions; display-only.*
Called by	The name of the function that performed this inventory transaction. This field is not currently implemented. *Alphanumeric, 40 positions; display-only.*
Error (Inventory transaction error description)	A description of the transaction error that occurred. *Alphanumeric, 25 positions; display-only.*
Cost	The unit cost of the item. *Numeric, 13 positions with a 4-place decimal; display-only.*

Field	Description
Price	The unit price of the item on the order, if the transaction error involved an order. *Numeric, 13 positions with a 2-place decimal; display-only.*
Batch #	The number of the batch containing the attempted inventory transaction, if this error was a result of immediate or batch inventory transactions. *Numeric, 13 positions; display-only.*
Transaction reason	The code identifying the reason for the inventory transaction, if one was specified. *Numeric, 2 positions; display-only.*
Express bill	This flag indicates whether the transaction represented an express bill, or an order that bypasses reservation, pick slip generation, and shipment confirmation. An order is processed as an express bill if the ship via on the order header has a Billing code of Express Bill. Valid values are: • Selected = Transaction was an express bill • Unselected = Transaction was not an express bill
S/H	This flag indicates whether the item associated with the transaction required special handling. Valid values are: • Selected = Item required special handling • Unselected = Item did not require special handling
Auto restock	This flag indicates whether the transaction was a replenishment to the *Auto restock location* in the “to” warehouse. Valid values are: • Selected = Transaction was a replenishment to an auto restock location • Unselected = Transaction was not a replenishment to an auto restock location
Delete location	This flag indicates whether the item location record should be deleted when the transaction is complete. Ordinarily, the system deletes an item location record when the on-hand falls to zero, unless it is a primary location. Valid values are: • Selected = Item location should be deleted • Unselected = Item location should not be deleted

Generic Interface Error Screen

Purpose: Use this screen to review or work with errors that occur through the *Generic Inventory Transaction Upload*.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

How to display this screen:

- Select Change for a generic upload error at the Work with Inventory Transaction Errors Screen to display this screen in Change mode.

- Select Display for a generic upload error Work with Inventory Transaction Errors Screen to display this screen in Display mode; in this case, all fields are display-only.

> **Note:**
>
> You cannot display this screen for a system transaction error (the I (Interface error) flag is unselected).

Field	Description
Date	The date when the transaction error occurred. *Numeric, 6 positions (user date format); display-only.*
Transaction code	The code identifying the inventory transaction that was attempted when the transaction error occurred. For upload transactions, the *transaction_code* from the inventory transaction upload message defaults. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Defined in and validated against the Item Transaction Code table; see Work with Inventory Transaction Codes (WITC). *Alphanumeric, 1 position; required.*
Time	The time when the inventory transaction error occurred. *Numeric, 6 positions (HHMMSS format); display-only.*
Transaction reason	Defined in and validated against the Item Transaction Reason Code table; see Work with Inventory Transaction Reason Codes (WIT1). Required if the inventory transaction code has the Reason required flag selected. For upload transactions, the *transaction_reason*, if any specified in the inventory transaction upload message defaults. *Numeric, 2 positions; optional or required.* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Error	The description of the error that occurred. It is possible for an uploaded transaction to have more than one error. See *Inventory Transaction Upload Errors* for a list of errors and descriptions. *Alphanumeric, 25 positions; display-only.* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Allow partial	The setting of the *allow_partial* flag from the inventory transaction upload message. Valid values are: • unselected = do not process a partial quantity; put the transaction in error if the full quantity cannot be processed See *Processing Partial Quantities* for a discussion. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Field	Description
Batch #	The batch number to identify a transaction or group of transactions. The *batch_number*, if any, specified in the inventory transaction upload message defaults. *Numeric, 7 positions; optional.* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Create item warehouse	The setting of the *create_item_warehouse* flag from the inventory transaction upload message. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Valid values are: • unselected = do not create a new Item Warehouse record; put the transaction in error if the Item Warehouse does not exist In the case of a transfer (T) or item-to-item transfer (G) transaction, this value refers to the To warehouse; otherwise, it refers to the warehouse specified in the Warehouse.
Identification #	A number to identify the transaction. Not valid with item-to-item (G) transactions. The *identification_nbr*, if any, specified in the inventory transaction upload message defaults. *Numeric, 10 positions; optional.* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Create item location	The setting of the *create_item_location* flag from the inventory transaction upload message. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Valid values are: • unselected = do not create a new Item Location record; put the transaction in error if the Item Location does not exist • In order to create both a new Item Warehouse and a new Item Location, both this flag and the Create item warehouse flag must be selected. • In the case of a transfer (T) or item-to-item transfer (G) transaction, this value refers to the To location; otherwise, it refers to the warehouse specified in the Location.
Entered by user	The user ID of the user that entered the inventory transaction. The *entered_by_user*, if any, specified in the inventory transaction upload message defaults. *Alphanumeric, 10 positions; optional.* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
To company	Used for transfer (T) and item-to-item transfer (G) transactions only, and only when the "to" company is different from the "from" (current) company. See *Summary of Transaction Rules* for a summary. The *company*, if any, specified in the *TransactionTo* element of the inventory transaction upload message defaults. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). *Numeric, 3 positions; optional.*

Field	Description
Item	Defined in and validated against the Item table; see Performing Initial Item Entry (MITM). See *Resolving the Item and SKU* for information on how the system identifies the correct item and SKU. The *item_number*, if any, specified in the *Transaction* element of the inventory transaction upload message defaults. *Alphanumeric, 12 positions; optional.* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
To item #	Defined in and validated against the Item table; see Performing Initial Item Entry (MITM). See *Resolving the Item and SKU* for information on how the system identifies the correct item and SKU. The *item_number*, if any, specified in the *TransactionTo* element of the inventory transaction upload message defaults. Used for item-to-item transfer (G) transactions only. See *Summary of Transaction Rules* for a summary. *Alphanumeric, 12 positions; optional.* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
SKU	The item's unique characteristics, such as its color and size. Required if the Item is specified and the item has SKUs. The *sku_code*, if any, specified in the *Transaction* element of the inventory transaction upload message defaults. See *Resolving the Item and SKU* for more information. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). *Alphanumeric, 14 positions; optional.*
To SKU	The item's unique characteristics, such as its color and size. Required if the *item_number* is specified and the item has SKUs. See *Resolving the Item and SKU* for more information. The *sku_code*, if any, specified in the *TransactionTo* element of the inventory transaction upload message defaults. Used for item-to-item transfer (G) transactions only. See *Summary of Transaction Rules* for a summary. *Alphanumeric, 14 positions; optional.* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Short SKU	An additional code to identify an item and SKU. The *short_sku*, if any, specified in the *Transaction* element of the inventory transaction upload message defaults. See *Resolving the Item and SKU* for more information. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). *Numeric, 7 positions; optional.*

Field	Description
To short SKU	The *short_sku*, if any, specified in the *TransactionTo* element of the inventory transaction upload message defaults. See *Resolving the Item and SKU* for more information. Used for item-to-item transfer (G) transactions only. See *Summary of Transaction Rules* for a summary. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). *Numeric, 7 positions; optional.*
Retail ref #	An additional code or reference number to identify an item and SKU. The *retail_reference_nbr*, if any, specified in the *Transaction* element of the inventory transaction upload message defaults. See *Resolving the Item and SKU* for more information. For more information see the Administration Web Services Guide on My Oracle Support (ID 2953017.1). *Numeric, 15 positions; optional.*
To retail ref #	The *retail_reference_nbr*, if any, specified in the *TransactionTo* element of the inventory transaction upload message defaults. See *Resolving the Item and SKU* for more information. Used for item-to-item transfer (G) transactions only. See *Summary of Transaction Rules* for a summary. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). *Numeric, 15 positions; optional.*
UPC type	A code to identify the format of the Universal Product Code. The *upc_type*, if any, specified in the *Transaction* element of the inventory transaction upload message defaults. See *Resolving the Item and SKU* for more information. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). *Alphanumeric, 3 positions; optional.*
To UPC type	The *upc_type*, if any, specified in the *TransactionTo* element of the inventory transaction upload message defaults. See *Resolving the Item and SKU* for more information. Used for item-to-item transfer (G) transactions only. See *Summary of Transaction Rules* for a summary. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). *Alphanumeric, 3 positions; optional.*

Field	Description
UPC	The Universal Product Code. The *upc_code*, if any, specified in the *Transaction* element of the inventory transaction upload message defaults. See *Resolving the Item and SKU* for more information. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). **Note:** Include any leading zeros. For example, if the UPC code is 06012011, enter `06012011` and not `6012011`. *Alphanumeric, 14 positions; optional.*
To UPC	The *upc_code*, if any, specified in the *TransactionTo* element of the inventory transaction upload message defaults. See *Resolving the Item and SKU* for more information. Used for item-to-item transfer (G) transactions only. See *Summary of Transaction Rules* for a summary. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). **Note:** Include any leading zeros. For example, if the UPC code is 06012011, enter `06012011` and not `6012011`. *Alphanumeric, 14 positions; optional.*
Warehouse	A code to identify the warehouse where the item is located. Defined in and validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS). For upload transactions, the *warehouse*, if any, specified in the *Transaction* element of the inventory transaction upload message defaults. Represents the "from" warehouse for transfer (T) and item-to-item transfer (G) transactions. *Numeric, 3 positions; required.* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Field	Description
To warehouse	A code to identify the warehouse to move the item. Defined in and validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS). For upload transactions, the *warehouse*, if any, specified in the *TransactionTo* element of the inventory transaction upload message defaults. Used for transfer (T) and item-to-item transfer (G) transactions only. *Numeric, 3 positions; optional.* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Location	A code to identify the location in the warehouse where the item is located. Defined in and validated against the Location table; see Creating and Maintaining Locations (WLOC). For upload transactions, the *location*, if any, specified in the *Transaction* element of the inventory transaction upload message defaults. Represents the "from" location for transfer (T) and item-to-item transfer (G) transactions. *Alphanumeric, 7 positions; required.* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
To location	A code to identify the location in the warehouse to move the item. Defined in and validated against the Location table; see Creating and Maintaining Locations (WLOC). For upload transactions, the *transaction_quantity*, if any, specified in the *TransactionTo* element of the inventory transaction upload message defaults. Used for transfer (T) and item-to-item transfer (G) transactions only. *Alphanumeric, 7 positions; optional.* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Quantity	The quantity of the item and SKU that is affected by the transaction. For upload transactions, the *transaction_quantity*, if any, specified in the inventory transaction upload message defaults. The actual effect on inventory varies with the transaction. See *Summary of Transaction Rules* for more information. *Numeric, 5 positions; required.* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Field	Description
S/O control	Updates the SKU table if the item will be sold out as a result of an item-to-item (G) transfer. Validated against the Soldout Control table; see Working with Soldout Controls (WSLD). If a soldout control code is indicated, it must represent a valid code even if it is not required for the transaction. For upload transactions, the *so_control*, if any, specified in the *Transaction* element of the inventory transaction upload message defaults. *Alphanumeric, 2 positions; optional.* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Completing this screen: See *Inventory Transaction Upload Errors* for a discussion of each error.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Correct any fields and Select OK. The system validates your entries and highlights any fields you need to correct. If the system does not highlight any errors, you can reprocess it; see Reprocessing Transactions.

> **Note:**
>
> After you correct an error and reprocess the transaction, it is possible for the transaction to remain in error status if there is an additional problem. You can repeat the correction and reprocessing steps; alternatively, you can delete the transaction error and use Working with Inventory Transactions (WITI) to process the transaction.

Reprocessing Transactions

Purpose: You can complete unprocessed inventory transactions at the Work with Inventory Transaction Errors Screen, provided that:

- the error was “negative on hand” or occurred through the *Generic Inventory Transaction Upload*.
- you have corrected the condition that produced the error

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Reprocess an individual transaction: Select Reprocess for a transaction error to reprocess it. If it is possible to complete the inventory transaction at this time, the error will be deleted from the screen, and the following message indicates:

```
Transaction was successfully reprocessed!
```

Otherwise, the system displays an error message.

Reprocess all transactions: Select Reprocess to reprocess all eligible transactions. The Process Item Transaction Errors window opens.

Optionally, enter the item and SKU to complete inventory transactions for that item/SKU only, or select Reprocess to reprocess transactions for all items. The system submits the job PROC_WITE, which reprocesses each eligible transaction. Transaction errors remain for any transactions that were not eligible for completion.

Pick slip preparation: If a transaction causes the system to unreserve an order because the on hand quantity was reduced below the reserved quantity, the system removes any pick slip preparation from the order and then reevaluates the order for pick slip preparation; see Preparing Orders for Pick Slip Generation.

Finished Good Work Order Processing (WWOR)

Purpose: A finished good is an item, comprised of one or more component items, that requires assembly prior to picking and packing. Work order processing is the ability to reserve component items while you assemble a finished good. A work order builds a finished good item by increasing the inventory of the finished good and decreasing the inventory of its component items.

The work order process:

- identifies the finished good to create
- suggests where to pick the component items to make up the finished good
- creates a make up finished good inventory transaction (transaction code = M)
- writes inventory transaction history for the finished good and its component items

> **Note:**
>
> You cannot add a new component to a finished good if it has an open work order. See Entering Finished Goods Information (WFGD) and Importing Set Components (WCUP).

In this topic:

- Work with Work Orders Screen
- Create Work Orders Screen
  - Work Order Validations
- Create Work Order Details Screen
- Work with Work Order Detail Locations Screen
- Change Work Order Location Window
- Change Work Orders Screen
- Processing Work Orders
  - Select Location Window
- Work with Kit Makeup Screen
- Create Kit Makeup Location Screen

For more information:

- finished goods: Entering Finished Goods Information (WFGD)

- reviewing inventory transaction history for finished goods and their component items: Display Inventory Transaction History (DITH)

Work with Work Orders Screen

Purpose: Use this screen to:

- create a work order
- change, delete or display an existing work order
- process a work order

How to display this screen: Enter WWOR in the *Fast path* field at the top of any menu or select Work with Work Orders from a menu.

Field	Description
Work # (Work order number)	The number used to identify the work order. The system assigns work order numbers from the Purchase Order Header field in the Number Assignment table. *Numeric, 7 positions; optional.*
Item number	The finished good to be produced. *Alphanumeric, 12 positions; optional.*
COLR SIZE OTHR	The SKU of the finished good item to be produced. *Alphanumeric, three 4-position fields; optional.*
Created on	The date the work order was created. *Numeric, 8 positions (user date format); optional.*
Due date	The date the finished good item is scheduled to be available for sale. This date is indicated in Order Entry, Order Maintenance, standard or streamlined Order Inquiry, and in Item Availability. *Numeric, 8 positions (user date format); optional.*
Vendor	The code for the vendor who is responsible for producing the finished good item. *Numeric, 7 positions, display-only.*

Screen Option	Procedure
Change a work order	Select Change for a work order to advance to the Change Work Orders Screen.
Delete a work order	Select Delete for a work order to delete it. When you delete a work order: • The Protected qty (Protected quantity) field for each component item in the Item Warehouse table is reduced by the amount specified in the work order • The Protected qty (Protected quantity) field for each component item in the Item Location table is reduced by the amount specified in the work order • The On order field for the finished good in the Item Warehouse table is reduced by the quantity deleted in this work order
Display a work order	Select Display for a work order to advance to the Display Work Order Screen.

Screen Option	Procedure
Process a work order	Select Process for a work order to advance to the Select Location pop-up window. See Processing Work Orders.
Create a work order	Select Create to advance to the Create Work Orders Screen.

Create Work Orders Screen

Purpose: Use this screen to create the header information for a finished good work order. The header information includes:

- the work order number
- the warehouse where the finished good and its component items are located
- the quantity of the finished good to be produced
- the date the finished good is expected to be available for sale

How to display this screen: Select Create at the Work with Work Orders Screen.

Field	Description
Work order #	The number used to identify the work order. The system assigns work order numbers from the Purchase Order Header field in the Number Assignment table. *Numeric, 7 positions; display-only if system-assigned; required if manually entered.*
Warehouse	The warehouse code and description where the finished good and its component items are stored. The warehouse code defaults from the Default Warehouse (A04) system control value. Warehouse codes are defined in and validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS). *Warehouse code: Numeric, 3 positions; required.* *Warehouse description: Alphanumeric, 30 positions; display-only.*
Item and SKU	The item code and SKU of the finished good to be produced. You define an item as a finished good by entering an F in the *Kit type* field in the Item table. The following message indicates that the item entered is not a finished good item: `Item is not Finished Good` A message similar to the following indicates that an Item Warehouse record does not exist for the item and warehouse you have entered: `Item/SKU (DOLL KIT/) does not exist for this warehouse (10)` *Item: Alphanumeric, 12 positions; required.* *SKU: Alphanumeric, three 4-position fields; required if the item has SKUs.*
Qty (Quantity)	The quantity of the finished good to be produced. *Numeric, 7 positions; required.*

Field	Description
Due date	The date the finished good is scheduled to be available for sale. This date is indicated in Order Entry, Order Maintenance, standard or streamlined Order Inquiry, and in Item Availability. *Numeric, 8 positions (user date format); required.*
Vendor	The code for the vendor who is responsible for producing the finished good. Vendor codes are defined in and validated against the Vendor table; see Working with Vendors (WVEN). *Numeric, 7 positions; required.*

Completing this screen: The message `'Suggesting locations, please wait'` is displayed at the bottom of the screen. The system checks the available on-hand quantity of each component item in the warehouse and determines the locations from which each component item is picked to make up the finished good before advancing to the Create Work Order Details Screen. See Work Order Validations.

System updates: When a work order header is created:

- The Protected qty (Protected quantity) field in the Item Warehouse table for each component item is increased by the quantity needed to make up the finished good.
- The On order field in the Item Warehouse table for the finished good is increased by the amount being assembled for the work order.
- The Pending transfer quantity field in the Item Location table for each component item is increased by the quantity needed to make up the finished good. This quantity is a negative quantity since the component items will be transferred from their locations to the location for the finished good.

Work Order Validations

The system performs the following validations when a work order is created:

1. Determines the available on-hand quantity of the component items in the warehouse entered on the Create Work Orders Screen, using the following calculation:

   ```
   Component quantity < on-hand - (reserved + protected) = available on-hand
   quantity
   ```

   An error message similar to the following indicates if the component quantity is greater than the available on-hand quantity:

   ```
   Component FNHCMP34 - Warehouse qty (9) less than the requested qty (12)
   ```

2. Determines the available on-hand quantity of the component items in the warehouse locations using the location type sequence. The system uses the following calculation:

   ```
   On-hand - (printed - negative pending transfer quantity) = available on-hand
   location quantity
   ```

   An error message similar to the following indicates if the system cannot find one or more locations that can fulfill the entire quantity needed to make up the finished good:

   ```
   Component FNHCMP36 - Warehouse qty (9) less than requested qty (12)
   ```

3. Checks that the locations are not frozen.
4. Checks that the item locations are not frozen.

Create Work Order Details Screen

Purpose: This screen displays all of the component items needed to make up the finished good you have entered on the Create Work Orders Screen. Use this screen to accept, reject or change the locations the system has suggested to pick each component item.

How to display this screen: Select OK to accept the work order you have created on the Create Work Orders Screen.

> **Note:**
>
> Component items are highlighted if an error occurred while the system was suggesting component locations to pick. The system will not accept the work order until you correct all items in error.

Field	Description
Work order #	The work order number assigned to this work order. *Numeric, 7 positions; display-only.*
Warehouse (Warehouse and description)	The warehouse code and warehouse description where the finished good and its component items are stored. Warehouse codes are defined in and validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS). *Warehouse code: Numeric, 3 positions; required.* *Warehouse description: Alphanumeric, 30 positions; display-only.*
Kit	The item, SKU and description of the finished good entered on the Create Work Orders Screen. *Item: Alphanumeric, 12 positions; display-only. SKU: Alphanumeric, three 4-position fields; display-only.* *Description: Alphanumeric, 30 positions; display-only.*
Quantity	The quantity of the finished good to be produced. The quantity defaults from the Create Work Orders Screen. If you change the amount in the Quantity field, the system recalculates the available quantities in each location. *Numeric, 7 positions; required.*
Component	The item/SKU of the component items that make up the finished good item. The component items default from the Kit Detail table. *Item: Alphanumeric, 12 positions; display-only.* *SKU: Alphanumeric, three 4-position fields; display-only.*
Description	The description of the component item. *Alphanumeric, 25 positions; display-only.*
Kit qty (Kit quantity)	The quantity of the component item used to make up one finished good item. The kit quantity defaults from the Quantity field in the Kit Detail table. *Numeric, 5 positions; display-only.*

Field	Description
Tot qty (Total quantity)	The total quantity of the component item needed to make up the total quantity of finished goods. The system determines the total quantity of component items needed using the following calculation: `kit quantity x total quantity of finished good = total quantity of component items needed` Example: `Kit quantity = 2` `Total quantity of finished goods = 10` `kit quantity (2) x total quantity (10) = total quantity of components needed (20)` *Numeric, 7 positions; display-only.*
Location	The location where the system suggests to pick the component items. If more than one location has been suggested, the location field appears blank and a plus (+) sign is displayed. If you change the location for a component item, the system checks that: • the item exists in that location • the item/location reservation freeze flag = Unselected • the location freeze flag = Unselected • the available quantity in the location is equal to or greater than the quantity needed to make up the finished good The system determines the available on-hand quantity in a location using the following calculation: `On-hand - (printed - negative pending transfer quantity) = available on-hand quantity` You can also add locations to a component item by selecting Locations for the component you wish to change. See Work with Work Order Detail Locations Screen. *Alphanumeric, 7 positions; required.*

Instructions:

1. *Optionally*, you can change the *Quantity and/or Location* fields. The system recalculates the quantities in each location to determine if each component item needed is available.
2. *Optionally*, you can add locations to a component item by selecting Locations for the item. See the Work with Work Order Detail Locations Screen.
3. Select Accept to accept the work order details or select Reject to reject them. You return to the Create Work Orders Screen, where you can enter another work order.

System updates: When you select Accept to accept the work order details:

- The system creates the details of a work order (this work order is displayed on the Work with Work Orders Screen).
- The Protected qty (Protected quantity) field in the Item Warehouse table for each component item is increased by the amount needed to make up the finished good.

- The Pending transfer quantity field in the Item Warehouse table for each component item is increased by the quantity needed to make up the finished good. This quantity is a negative quantity since the component items are transferred from their locations to the location for the finished good.
- The On Order field in the Item Warehouse table for the finished good is increased by the quantity being assembled.

Screen Option	Procedure
Add locations to a component item	Select Locations for a component item to advance to the Work with Work Order Detail Locations Screen.
Accept the work order details	Select Accept to accept the work order details.
Reject the work order details	Select Reject to reject the work order details.

Work with Work Order Detail Locations Screen

Purpose: This screen is used to pick component items from more than one location, or to display, change or delete the system-recommended locations.

How to display this screen: Select Locations for a component at the Create Work Order Details Screen.

The system-recommended locations display in the lower half of the screen.

Field	Description
Work order #	The work order number for this component item. *Numeric, 7 positions; display-only.*
Ln. (Line number)	The line number where this component item is located on the work order. *Numeric, 3 positions; display-only.*
Item (Item/SKU and description)	The item number, SKU and item description for this component item. *Item: Alphanumeric, 12 positions; display-only.* *SKU: Alphanumeric, three 4-position fields; display-only.* *Item description: Alphanumeric, 120 positions; display-only.*
Qty needed	The quantity of this component item needed to make up the finished goods. This amount defaults from the Create Work Order Details Screen. *Numeric, 7 positions; display-only.*
Qty selected	The total quantity of this component item selected for the finished good across all locations. This field is updated as you add, change or delete locations to pick this component item in order to make up the finished good. The total quantity selected must equal the amount in the *Quantity needed* field or the following error message indicates: `Qty needed (1) must equal Qty selected (2)` *Numeric, 7 positions; display-only.*

Field	Description
Qty	The quantity of this component item to be picked from the associated location. The total quantity entered for all locations must equal the amount in the Quantity needed field. *Numeric, 7 positions; optional.*
Whs	The code for the warehouse where the component items are picked for the finished good. The warehouse code entered on the Create Work Orders Screen defaults and cannot be overridden. Warehouse codes are defined in and validated against the Warehouse table. *Alphanumeric, 3 positions; display-only.*
Location	The location from which the associated quantity is picked. *Alphanumeric, 7 positions; optional.*

Screen Option	Procedure
Change a detail location	Select Change for a location to advance to the Change Work Order Location Window.
Delete a detail location	Select Delete for the location you want to delete. The location and its associated quantity clears from the screen.
Accept the detail locations	Select Accept to accept the locations and their associated quantities.
Reject the detail locations	Select Reject to reject the locations and their associated quantities.

Instructions:

1. Review the system-suggested locations. See Change Work Order Location Window for more information on changing or deleting detail locations.
2. Enter the quantity of the component item you want to pick in the *Quantity* field.
3. In the *Location* field, enter the location code where the quantity will be picked. You must enter a valid warehouse location for the component item. A message similar to the following indicates if the location you enter is invalid: `Item Location does not exist for Item (DRAWING PAD)`.
4. The system displays the quantity, warehouse and location at the bottom of the screen and increases the amount in the *Quantity selected* field in the top of the screen.
5. Select Accept to accept the locations you have created. The system verifies that the *Quantity needed* field equals the *Quantity selected* field. The following message indicates if the quantities are not the same: `Qty needed (1) must equal Qty selected (2)`
6. Select Reject to reject the changes you have made.

System updates: When you select Accept to accept the locations you have created, the Pending transfer quantity field in the Item Location table is increased by the quantity you entered. This quantity is a negative quantity since the component item is transferred from this location to the location for the finished good.

See Work Order Validations for a list of validations the system performs before accepting a work order detail location.

Change Work Order Location Window

Changing detail locations: To change a work order detail location for a component item, select Change for the location at the Work with Work Order Detail Locations Screen. Enter an amount in the *Quantity* field to change the amount picked from the location to make up the finished good item. See Work Order Validations for more information on the validations the system performs when you change a work order detail location.

Change Work Orders Screen

To change a work order: Select Change for a work order on the Work with Work Orders Screen to advance to the Change Work Orders screen. You can change only the *Due date* field on this screen. See Create Work Orders Screen for field descriptions. The following message indicates if the date you entered is less than today's date:

```
Due date must be Greater than or equal to today's date
```

Change the due date if necessary and select Accept to accept the change. You return to the Work with Work Orders Screen.

Display Work Order Screen

To display a work order: Select Display for a work order on the Work with Work Orders Screen to advance to the Display Work Order screen. The Display Work Order screen indicates the details of a finished good work order including:

- the work order number
- the warehouse where the finished good and its component items are located
- the vendor who is responsible for producing the finished good
- the quantity of the finished good to be assembled
- the date the finished good is available for sale
- the component items that make up the finished good
- the locations the component items are taken from to make up the finished good

See Create Work Order Details Screen for a description of the fields on this screen.

You can also display a component's locations from this screen by selecting a component item. You advance to the Display Work Order Locations screen.

An error message similar to the following indicates if you select Locations for a component item that is not taken from more than one location:

```
This record does not have multiple locations to display
```

See Work with Work Order Detail Locations Screen for a description of the fields on this screen.

Processing Work Orders

Purpose: Once you have assembled all of the finished goods for a work order, you can process it. Processing work orders increases the inventory of the finished good and decreases the inventory of its component items through the make up finished good inventory transaction (transaction code = M).

To perform the make up finished good inventory transaction you must:

- define the location where the finished good is stored
- define the location or locations from which the component items are picked from to make up the finished good

Select Location Window

You can process a work order on the Work with Work Orders Screen by selecting Process for a work order. The Select Location pop-up window opens.

Field	Description
Work order #	The number of the work order you are processing. *Numeric, 7 positions; display-only.*
Kit	The item, SKU and description of the finished good you are processing. *Item: Alphanumeric, 12 positions; display-only.* *SKU: Alphanumeric, three 4-position fields; display-only.*
Warehouse	The warehouse code and description in which the finished good you are processing is stored. Warehouse codes are defined in and validated against the Warehouse table. *Warehouse code: Numeric, 3 positions; display-only.* *Warehouse description: Alphanumeric, 30 positions; display-only.*
Quantity	The total quantity of finished goods to be produced on this work order. The quantity you entered when you created the work order defaults, but can be overridden. You can process a portion of the finished goods that are ready on the work order by entering a quantity less than the total quantity available. The finished goods that are not processed, remain open on the work order until you process them. *Numeric, 7 positions; required.*
Location	The location where the finished good will be placed once it is processed. The primary location for this finished good defaults if you have selected the Default Primary Location (C05) system control value. You can prompt on this field to advance to the Select Item Location screen, where you can select an item location to default to the *Location* field on the Select Location window. If you do not select a location at the Select Item Location screen, you return to the Select Location window and the *Location* field updates to blank. *Alphanumeric, 7 positions; required.*

Instructions: Use the following steps to select the quantity of the finished good you want to process and the location where the finished goods will be placed once they are assembled.

1. Review the quantity of the finished goods to assemble for this work order. To change the amount, enter a different quantity in the *Quantity* field. The following message indicates if you enter a quantity that is greater than the original quantity: `Quantity entered cannot be greater than original quantity.`
2. Enter the location where you want the finished goods to be placed once they are assembled.

3. Select OK to accept the quantity and location you entered. You advance to the Work with Kit Makeup Screen, where you can arrange the component items on the work order and process a make up finished good inventory transaction (transaction code = M).

System validations: When you select OK, the system checks that;

- The location you entered exists. A message similar to the following indicates if the location you entered does not exist:

  ```
  Location (K010104) does not exist.
  ```

- The location you entered is not frozen. A message similar to the following indicates if the location you entered is frozen:

  ```
  Location K010104 frozen
  ```

- The item/location you entered is not frozen. A message similar to the following indicates if the item/location you entered is frozen:

  ```
  Location K010104 frozen
  ```

- If the location you entered is a primary location, the Allow Multiple Primary Item Locations (D12) system control value is set to ALLOW.
- The location class for the location matches the location class for the item if the Allow Location Class Edit in Inventory Transaction (F86) system control value is selected. An error message similar to the following indicates if the location's location class does not match the item's location class:

  ```
  Item is not compatible with Location.
  ```

- The quantity you entered in the *Quantity* field is not greater than the original quantity. An error message similar to the following indicates if you enter a quantity that is greater than the original quantity:

  ```
  Quantity entered cannot be greater than original quantity.
  ```

- The Default Primary Location (C05) system control value is selected. An error message similar to the following indicates if you have not selected this field:

  ```
  No Default Location was found. Please enter a location.
  ```

Work with Kit Makeup Screen

Purpose: Use this screen to arrange the component items on a finished good work order and process a make up finished good inventory transaction (transaction code = M).

How to display this screen: Select OK on the Select Location Window. You can also display this screen by entering valid information for a finished good at the Work with Inventory Transactions Screen.

Field	Description
Batch #	The number of the batch assigned to this work order. The batch number is used to keep track of the component items that make up the finished good. *Numeric, 7 positions; display-only.*
Work order #	The number used to identify the work order that this finished good is assigned to. *Numeric, 7 positions; display-only.*

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Kit</td><td>The item, SKU and description of the finished good on this work order.
Item: Alphanumeric, 12 positions; display-only.
SKU: Alphanumeric, three 4-position fields; display-only.
Description: Alphanumeric, 30 positions; display-only.</td></tr>
<tr><td>Component</td><td>The item, SKU and description of a component item that makes up the finished good.
Item: Alphanumeric, 12 positions; display-only.
SKU: Alphanumeric, three 4-position fields; display-only.
Description: Alphanumeric, 30 positions; display-only.</td></tr>
<tr><td>Control quantity</td><td>The quantity of the component that is needed to make up the finished good.
Numeric, 7 positions; display-only.</td></tr>
<tr><td>Actual quantity</td><td>The quantity of the component that is taken from a location. If you are taking a component from more than one location, be sure the actual quantity matches the control quantity.
Numeric, 7 positions; required.</td></tr>
<tr><td>Whs (Warehouse)</td><td>A code for the warehouse that contains the component item. Warehouse codes are defined in and validated against the Warehouse table. The warehouse code for this work order defaults.
Numeric, 3 positions; display-only.</td></tr>
<tr><td>Location</td><td>The location from which the system suggests to pick the component items. If more than one location has been suggested, the Location field is blank and a plus (+) sign is displayed.
If you change the location for a component item, the system checks that:
• the item exists in that location
• the item/location freeze flag = Unselected
• the available quantity in the location is equal to or greater than the quantity needed to make up the finished good
You can add locations to a component item by selecting Locations for the component item you wish to change. See Select Location Window.
Alphanumeric, 7 positions; required.</td></tr>
</table>

Instructions:

1. Complete the necessary fields.
2. Select Accept.
3. You return to the Work with Work Orders Screen, where you can process another finished good work order.

System validations: When you select Accept to process a work order, the system checks that:

- The component items exist in the locations specified. A message similar to the following indicates if a component item does not exist in the location specified:

```
The system could not reserve the entire Qty required. Qty available
(0)
```

- There is enough available on-hand quantity in each location for each component item to make up the finished good. If the on-hand quantity is not enough, the system will not process the work order and displays the following message: `Trans qty (-100) will cause on hand quantity in item location to be negative`. The system uses the following calculation to determine the amount available in each location:

  ```
  On-hand - [printed - (pending quantity - pending work order quantity)
  = available on-hand
  ```

- The amount of component items taken from each location will not reduce the on-hand quantity below the reserved quantity.
- The locations are not frozen.
- The item locations are not frozen.

System updates: When you select Accept to process a work order:

- The make up finished good inventory transaction is processed (this increases the amount of finished goods and decreases the amount of each component item).
- Inventory transaction history records are created for the finished good and its component items. See Display Inventory Transaction History (DITH).
- The Pending transfer quantity field in the Item Location table for each component item is reduced by the quantity processed.
- The work order record is deleted if the entire quantity of finished goods on the work order has been processed; if not, the quantity in the Work Order Header table is reduced by the quantity processed.
- The Protected qty (Protected quantity) field in the Item Warehouse table for each component item is reduced by the quantity processed.
- The On order field in the Item Warehouse table for the finished good is reduced by the quantity processed.

Screen Option	Procedure
Add a component location	Select Add location for the component to advance to the Create Kit Makeup Location Screen.
Accept the kit	Select Accept. You return to the Work with Work Orders Screen.

Create Kit Makeup Location Screen

Purpose: Use this screen to add locations to component items. Adding locations allows you to take a component item from more than one location to make up the finished good. There must be a quantity in each location before you can perform this transaction.

How to display this screen: Select Add location for the component item at the Work with Kit Makeup Screen.

Field	Description
Actual quantity	The quantity of the component item that is taken from a location. If you are taking a component item from more that one location, be sure the actual quantity matches the control quantity. *Alphanumeric, 7 positions; required.*
Location	The location from which the system suggests to pick the component items. If more than one location has been suggested, the Location field is blank and a plus (+) sign is displayed. If you change the location for a component item, the system checks that: • the item exists in that location • the item/location freeze flag = Unselected • the available quantity in the location is equal to or greater than the quantity needed to make up the finished good *Alphanumeric, 7 positions; required.*

System validations: When you add a location to a component item, the system checks that:

- The item location exists. A message similar to the following indicates if the item location you enter does not exist:

  ```
  Location (K010105) does not exist.
  ```

- The item location Reservation freeze flag is unselected. A message similar to the following indicates if the Reservation freeze flag in the item location table is selected:

  ```
  The system could not reserve the entire Qty required. Qty available (0)
  ```

- the location Freeze field is unselected. The following message indicates if the *Freeze* field in the location table is selected:

  ```
  No available location found for component item
  ```

- the Cls (Location class) for the location matches the Loc class (Location class) for the item if the Allow Location Class Edit in Inventory Transaction (F86) system control value is selected. An error message similar to the following indicates if the location's location class does not match the item's location class:

  ```
  Item is not compatible with Location.
  ```

- There is enough available on-hand quantity in the location for each component item to make up the finished good. The system uses the following calculation to determine the amount available in a location:

  ```
  On-hand - (printed - negative pending transfer quantity) = available on-hand
  ```

Transaction History

Topics in this part: The following topics describe the history information maintained for inventory transactions and how to display and print this information.

- Display Inventory Transaction History (DITH) describes the amount of history available, describes the inventory transaction history scan screen, and tells you how to display a specific record.
- Print Inventory Transaction History (PITH) tells you how to use the selection screen and how to print inventory transaction history. It also describes a sample report.

Display Inventory Transaction History (DITH)

Purpose: Inventory transaction history provides a record of all the transactions performed in your company. Transactions you enter, transactions the system performs in the background, and transactions processed through the Generic Inventory Transaction Upload are available through this menu option. You can restrict the display by scanning on different fields, including location, date, item number, SKU, and transaction codes.

How long is history available? Inventory transaction history remains on the system for at least the number of days specified in the Inventory Transaction History Retention Days (A24) system control value. When you run the Inventory Transaction History Purge function (*Fast path* = MITH), the system deletes any inventory transaction history older than this number of days.

Batch inventory overlay: The Batch Inventory Overlay Upload does not create inventory transaction history records.

In this topic:

- Inventory Transaction History Screen (1 of 2)
- Inventory Transaction History Screen (2 of 2)

Inventory Transaction History Screen (1 of 2)

Purpose: Use this screen to review inventory transactions or to select a particular transaction for detail review.

How to display this screen: Enter DITH in the *Fast path* field at the top of any menu or select Display Inventory Transaction History from a menu.

When you first advance to this screen, item transaction history records display in ascending item, SKU, warehouse code, transaction date, transaction time, item transaction history sequence number sequence. This is the sequence of records when you select View By FIFO.

Select View By LIFO to display item transaction history records in ascending item, SKU, warehouse code, descending transaction date, ascending transaction time, and item transaction history sequence number sequence.

Maximum number of records to display: The system displays the first 500 records in the Item Transaction History table for your company that meet your search criteria. The following message displays if there are more than 500 records to display:

The maximum number of records was exceeded. Please refine search criteria. Showing records 1-500.

You can use the fields on this screen to refine the item transaction history records you wish to review. In order to refine the records that display you must select OK after you enter your search criteria.

Column sort: You can sort on any of the columns on this screen by clicking the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Field	Description
Warehouse	The number of the warehouse where the transactions took place. Enter a valid warehouse code and select OK to display inventory transaction history for the specified warehouse. The description of the warehouse displays next to this field. Leave this field blank if you want to display inventory transaction history for all warehouses; in this situation, the text `ALL WAREHOUSES` displays next to this field. *Numeric, 3 positions, optional.*
Date From **Date To**	The date the transaction took place. • Enter a date range and select OK to display inventory transaction history for the specified date range. The *From* date must be equal to or earlier than the *To* date. • Enter a valid date in the first date field and select OK to display inventory transaction history, beginning with the date you entered. • Enter a valid date in the second date field and select OK to display inventory transaction history, ending with the date you entered. *Numeric, 6 positions (user date format); optional* A separate row displays for the first 500 item transaction history records that meet your search criteria.
Item	A code that represents a unit of inventory. Enter a valid item code and select OK to display inventory transaction history that matches your entry. *Alphanumeric, 12 positions; optional.*
Clr/size/wdth (SKU codes)	The item's unique characteristics, such as its color and size. Enter a valid SKU code and select OK to display inventory transaction history for items associated with this SKU. *Alphanumeric, three 4-position fields; optional.*
Date (Transaction date)	The date the transaction took place. *Numeric, 6 positions; display-only.*

Field	Description
Code	The inventory transaction code. Enter a valid inventory transaction code and select OK to display inventory transaction history for the specified inventory transaction code. These may be system- or user-defined. The system-defined codes are: • A = Adjustment • C = Customer Return • E = Express Bill • G = Item to Item Transfer • I = Issue **Note:** The system writes an issue (I) type transaction history record when non-inventory and drop ship items go through billing if the Create Item Transaction History for Non-Inventory Items (E39) system control value is selected. • O = Reset On-Hand Quantity • R = Receiving • T = Transfer • V = Return to Vendor See Work with Inventory Transaction Codes (WITC). *Alphanumeric, 1 position; optional.*
Location	The item's location at the time the transaction took place. The location is blank for drop shipments and non-inventory transactions. Enter a valid location and select OK to display inventory transaction history for the specified location. *Alphanumeric, 7 positions; optional.*
Reason	A code that represents the reason why the inventory transaction was performed. See Work with Inventory Transaction Reason Codes (WIT1). Enter a valid reason code and select OK to display inventory transaction history for the specified reason code. *Numeric, 2 positions; optional*
Qty (Quantity)	The number of units that this transaction affected. *Numeric, 8 positions; display-only.*
On-Hand Fields	
Old	The on-hand quantity for the item/location before the transaction was processed. The old on-hand quantity is blank for drop shipments and non-inventory transactions. *Numeric, 6 positions; display-only.*

Field	Description
New	The on-hand quantity for the item/location after the transaction was processed. The new on-hand quantity is blank for drop shipments and non-inventory transactions. *Numeric, 6 positions; display-only.*

Screen Option	Procedure
Display details of a transaction's history	Select Display for a transaction to display its history. See Inventory Transaction History Screen (2 of 2).
Toggle the display of transaction history records between ascending and descending date order	Select View by LIFO/FIFO. • FIFO displays in the upper left corner of the screen when you are viewing inventory transaction history in first in, first out sequence. • LIFO displays in the upper left corner of the screen when you are viewing inventory transaction history in last in, first out sequence.

Inventory Transaction History Screen (2 of 2)

Purpose: Use this screen to review detail information about an inventory transaction.

How to display this screen: From the Inventory Transaction History Screen (1 of 2), select Display for a transaction.

Field	Description
Warehouse	A code that represents the warehouse where the transaction was performed. The warehouse is 0 for drop shipments and non-inventory transactions. *Numeric, 3 positions.*
Item/SKU	Item = A code representing a unit of inventory. *Alphanumeric, 12 positions.* SKU = The item's unique characteristics, such as its color and size. *Alphanumeric, three 4-position fields.* Item description = A description of the item. The item description displays below the item code. *Alphanumeric, 120 positions.*
Date/Time/Seq# (Date, time and sequence number)	The date and time when the transaction was performed, and a unique number to identify how many transactions for the same warehouse and item/SKU took place at this same date and time. *Date: Numeric, 8 positions (user date format).* *Time: Numeric, 8 positions (HHMMSS format).* *Sequence number: Numeric, 3 positions.*

Field	Description
Code	A code that identifies types of inventory transactions. Certain codes are supplied by the system, and you can also create your own. System-supplied codes are: • A = Adjustment • C = Customer Return • E = Express Bill • G = Item to Item Transfer • I = Issue • M = Make up Finished Good • O = Reset On-Hand Quantity • R = Receiving • T = Transfer • V = Return to Vendor See Work with Inventory Transaction Codes (WITC). *Alphanumeric, 1 position.*
Location	The warehouse location affected by the inventory transaction. For example, if you are viewing an adjustment transaction, the location where the inventory was adjusted is indicated. The location is blank for drop shipments and non-inventory transactions. Two inventory transaction history records are created for transfer transactions: One record contains the “from” location; the other contains the “to” location. *Alphanumeric, 7 positions.*
Quantity	The number of units that this transaction affected. *Numeric, 8 positions.*
Old O/H (Old on-hand quantity)	The on-hand quantity before this transaction took place. This field is blank for non-inventory items and drop ship items, since inventory is not affected. *Numeric, 8 positions.*
New O/H (New on-hand quantity)	The on-hand quantity after this transaction took place. This field is blank for non-inventory items and drop ship items, since inventory is not affected. *Numeric, 8 positions.*

Field	Description
ID# Item transaction history ID	An identification number or description of the inventory transaction, either entered when the inventory transaction was created or assigned by the system. **Label settings:** Possible *ID#* labels assigned by the system include: • DROP SHIP = identifies a drop shipment inventory transaction. • NONINVISSU = identifies an inventory transaction record for a non-inventory item. **Note:** The system creates inventory transaction history records for drop ship and non-inventory items only if the Create Item Transaction History for Non-Inventory Items (E39) system control value is selected. **ID numbers:** The system also uses the *ID#* field to provide additional information for the following types of inventory transactions: • item-to-item transfers (transaction code = G) = a system-assigned ID number. Both the “from” and “to” transactions share the same ID number. • finished good make-up transaction (transaction code = M) = the work order number for the finished good created through the work order process. See Finished Good Work Order Processing (WWOR) for background. *Alphanumeric, 10 positions.*
Batch#	The number of the batch containing the inventory transaction. The system assigns batch numbers in both immediate and batch inventory transactions. *Numeric, 7 positions.*
Transaction#	The number of transactions within the batch. *Numeric, 7 positions.*
Order #	The number of the order affected by the inventory transaction. *Numeric, 7 positions.*
Invoice #	The number of the invoice affected by the inventory transaction. *Numeric, 7 positions.*
Purchase order #	The number of the purchase order affected by the inventory transaction. *Numeric, 7 positions.*
Reason	A code that represents the reason the inventory transaction was performed. Not all transactions have reason codes. See Work with Inventory Transaction Reason Codes (WIT1). *Numeric, 2 positions.*

Field	Description
User	The User ID of the person who performed the transaction. *Alphanumeric, 10 positions.*
Extended Cost	The unit cost of the item. The system uses the *Standard* cost from the SKU table for both SKU'd and non-SKU'd items. *Numeric, 13 positions with a four-place decimal.*

Print Inventory Transaction History (PITH)

Purpose: You can print transaction history in the same way that you view the history screens. You can choose the exact categories of items you want to print by specifying the warehouse, SKU, date, batch number, location, transaction code, reason code, or the user who performed the transaction.

In this topic:

- Print Inventory Transaction History Screen
- Inventory Transaction History Report

Print Inventory Transaction History Screen

How to display this screen: Enter PITH in the *Fast path* field at the top of a menu or select Print Transaction History from a menu

Selection criteria: Use the fields on the Print Inventory Transaction History screen to select the transactions you want printed. If you enter information in multiple fields, the system includes only those transactions that meet all qualifications.

Field	Description
Warehouse	A code that represents a warehouse. Validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS). *Numeric, 3 positions; optional.*
(Item) colr size othr	Four fields containing the item number and the SKU, a code that represents the special characteristics of an item, such as its color, width and size. These fields are validated against the Item table and the SKU table. *(Item) Alphanumeric, 12 positions; optional.* *(SKU) Alphanumeric, three 4-position fields; optional.*
Date	The date the transaction took place. *Numeric, 6 positions; optional.*
Batch#	The number of the batch of the transaction. *Numeric, 7 positions; optional*
Location	The code representing the area within the warehouse that contains the item or SKU. Validated against the Location table; see Creating and Maintaining Locations (WLOC). *Alphanumeric, 7 positions; optional*

Field	Description
Transaction Code	A code that described the type of transaction performed; system-supplied codes that pertain to transactions include: A Adjustment C Customer Return E Express Bill G Item to Item Transfer I Issue R Receiving T Transfer V Return to Vendor See Work with Inventory Transaction Codes (WITC). *Alphanumeric, 1 position; optional.*
Reason	A code that represents the reason the inventory transaction was performed; not all transactions require codes. See Work with Inventory Transaction Reason Codes (WIT1). *Numeric, 2 positions; optional.*
User	The User ID of the person who performed the transaction. *Alphanumeric, 8 positions; optional.*

Instructions: To print the Inventory Transaction History Report.

- Complete the necessary fields.
- Select Print list to submit the I/T_TRANS job.

Inventory Transaction Setup

Topics in this part: The following topics describe the setup required to perform inventory transactions.

- Work with Inventory Transaction Codes (WITC) explains the purpose of transaction codes, tells you how to work with the code scan screen, and tells you how to create, change, display, delete, and print transaction codes.
- Work with Inventory Transaction Reason Codes (WIT1) explains how to use the Transaction Reason Code scan screen, and how to create, change, display, delete, and print a list of reason codes.
- Verifying Inventory Sharing (VISH) explains how to generate the Verify Inventory Sharing Report, which lists the items in the sharing warehouse that are not setup correctly for inventory sharing.

Work with Inventory Transaction Codes (WITC)

Introduction: Inventory transaction codes provide a concise way to describe the transactions that are performed on inventory. These codes control whether the inventory is being increased, decreased, or just moved.

In this topic:

- System Codes

- Work with Inventory Transaction Codes Screen
- Create Inventory Transaction Code Screen
- Change Inventory Transaction Code Screen

System Codes

There are codes that come with the system and cannot be deleted. You can add customized codes for any purposes you require. Note that each code must consist of a unique number or letter.

Code	Description	Effect on Inventory Levels
A	Adjustment	Used in inventory transactions to increase on-hand if positive quantity is entered; decreases on-hand if negative quantity is entered.
C	Customer Return	Used by the system when processing return merchandise via the Return Authorization module or Order Maintenance. Return transactions will always increase the on-hand quantity in the specified warehouse.
E	Express Bill	Used by the system when processing an order that will not go through the normal pick and confirmation cycle (i.e., merchandise is already picked and shipped before the order is entered).
G	Item to Item Transfer	Used in inventory transactions to transfer one item to another, such as when you stop offering an item independently and include it in a grab bag instead. ()
I	Issue	Used by the system to decrease on-hand for confirmed shipments. The system writes an issue transaction for non-inventory and drop ship items when the Create Item Transaction History for Non-Inventory Items (E39) system control value is selected. See Display Inventory Transaction History (DITH).
O	Reset On-Hand Quantity	Used in inventory transactions to reset the on-hand quantity to the entered value. ()
R	Receiving	Used in the purchase order receipts program for merchandise received. Increments the on-hand.
T	Transfer	Used in inventory transactions to increase on-hand in "to" location and decreases the on-hand in "from" locations.
V	Return to Vendor	Used in inventory transactions to decrease on-hand amount if positive quantity is entered; increases on-hand if negative quantity is entered.

Components of codes: Codes have four attributes:

- An attribute that states whether the code can be used in inventory transactions or only by the system for other updating.
- An attribute that controls whether this code must have an additional reason code entered when the code is entered; see Work with Inventory Transaction Reason Codes (WIT1)

- A plus (+) or minus (-) code that indicates whether inventory will be increased or decreased by the quantity in the transaction.

Work with Inventory Transaction Codes Screen

Purpose: Use this screen to create, change, delete, or display transaction codes.

How to display this screen: Enter WITC in the *Fast path* field at the top of any menu or select Work with Inventory Transaction Codes from a menu.

Field	Description
Cde (Code)	The code representing an inventory transaction. *Alphanumeric, 1 position; optional.*
Description	A description of the code. *Alphanumeric, 30 positions; optional.*
Allow	Indicates whether you can use this code when processing inventory transactions, or if it is reserved for system use. Selected = Transaction is allowed in inventory transactions. Unselected = Transaction is not allowed in inventory transactions. **Note:** Even if this value is unselected, you can still process a transaction of this type through the *Generic Inventory Transaction Upload*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Rsn (Reason)	This setting indicates whether you must enter an inventory transaction reason code when you process this type of inventory transaction. Reason codes are defined in and validated against the Item Transaction Reason table; see Work with Inventory Transaction Reason Codes (WIT1). Selected = Reason code required. Unselected = Reason code not required.
+/- (Add to/Subtract from inventory)	This entry indicates how inventory will be affected when a transaction is processed with this code. Valid values are: + = Transaction quantity added to on-hand. - = Transaction quantity subtracted from on-hand. The inventory transaction code used as the Inventory Transaction Code for 'Sync' Processing (I85) should have this flag set to +. *Numeric, 1 position; optional.*

Screen Option	Procedure
Create an inventory transaction code	Select Create to advance to the Create Inventory Transaction Code Screen.
Change an inventory transaction code	Select Change for a code to advance to the Change Inventory Transaction Code Screen.

Screen Option	Procedure
Delete an inventory transaction code	Select Delete for a code to delete it.
Display an inventory transaction code	Select Display for a code to advance to the Display Inventory Transaction Code Screen. You cannot change any information on this screen. See the Create Inventory Transaction Code Screen for field descriptions.

Create Inventory Transaction Code Screen

Purpose: Use this screen to create an inventory transaction code.

How to display this screen: On the Work with Inventory Transaction Codes Screen, select Create.

Field	Description
Cde (Code)	The key to the Item Transaction Code table. The following codes are supplied with the system and cannot be deleted: A = Adjustment C = Customer Return E = Express Bill G = Item to Item Transfer I = Issue O = Reset On-Hand Quantity R = Receiving T = Transfer V = Return to Vendor See System Codes. *Alphanumeric, 1 position.* *Create screen: required.* *Change screen: display-only.*
Description	A description of the code. *Alphanumeric, 30 positions.* *Create screen, or change screen for user-defined codes: required.* *Change screen for system codes: display-only.*

Field	Description
Allowable	Indicates whether you can use this code during inventory transactions or if it is for system use only. Selected = You can use this code for inventory transactions. Unselected = You cannot use this code for inventory transactions. **Note:** • This field cannot be changed for system-supplied codes. • Even if this value is unselected, you can still process a transaction of this type through the *Generic Inventory Transaction Upload*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). *Create screen, or change screen for user-defined codes: required.* *Change screen for system codes: display-only.*
Reason required	This field indicates whether the transaction code requires a reason code. Reason codes are defined in and validated against the Item Transaction Reason table; see Work with Inventory Transaction Reason Codes (WIT1). Reason codes should not be required for codes that you cannot use for inventory transactions (*Allow* = Unselected). Selected = Reason code required. Unselected = Reason code not required. *Alphanumeric, 1 position; required.*
+/- (Add to/Subtract from inventory)	This entry indicates how inventory will be affected when a transaction is processed with this inventory transaction code. Valid values are: **+** = Transaction quantity added to on-hand. **-** = Transaction quantity subtracted from on-hand. **Note:** You cannot change this field for system-supplied codes. *Numeric, 1 position.* *Create screen, or change screen for user-defined codes: required.* *Change screen for system codes: display-only.*

Change Inventory Transaction Code Screen

To change: Select Change for the inventory transaction code at the Work with Inventory Transaction Codes Screen to advance to the Change Inventory Transaction Code screen.

You can change any field on this screen except the *Code* field for codes you define. You can change only the *Reason* field for system-supplied codes. See the Create Inventory Transaction Code Screen for field descriptions. Change the necessary information and select OK.

> **Note:**
>
> You cannot delete the System Codes.

Work with Inventory Transaction Reason Codes (WIT1)

Purpose: Use Work with Inventory Transaction Reason Codes to create, display, change, delete, or print the reason codes that are used immediate and batch inventory transactions.

Transaction reason codes explain why a transaction was performed. These codes display in Display Inventory Transaction History and Display Inventory Transaction Summary.

Transaction reason codes are only required on some transactions. For example, a Receiving transaction would not require a code, but a Return-to-Vendor transaction may require a code. When you create inventory transaction codes you determine whether or not a specific transaction code requires a reason code.

In this topic:

- Work with Inventory Transaction Reason Screen
- Create Inventory Transaction Reason Screen

Work with Inventory Transaction Reason Screen

Purpose: Use this screen to create, display, change, delete, or print the reason codes that are used immediate and batch inventory transactions.

How to display this screen: Enter WIT1 in the *Fast Path* field at the top of a menu or select the option from a menu.

Field	Description
Reason	A code that represents a reason to perform an inventory transaction, such as an adjustment, return-to-vendor, etc. *Numeric, 2 positions; optional.*
Description	A description of the code. *Alphanumeric, 30 positions; optional.*

Screen Option	Procedure
Create a new code	Select Create to advance to the Create Inventory Transaction Reason Screen.
Change a code	Select Change for a code to advance to the Change Inventory Transaction Reason Screen. You can change only the description. See the Create Inventory Transaction Reason Screen for field descriptions.
Delete a code	Select Delete for a code to delete it.
Display a code	Select Display for a code to advance to the Display Inventory Transaction Reason Screen. You cannot change any information at this screen. See the Create Inventory Transaction Reason Screen for field descriptions.

Create Inventory Transaction Reason Screen

To create: Select Create at the Work with Inventory Transaction Reason Screen.

Field	Description
Reason	A code that represents a reason to perform a transaction, such as the item is damaged. *Numeric, 2 positions.* *Create screen: required.* *Change screen: display-only.*
Description	A description of the code. *Alphanumeric, 30 positions; required.*

Verifying Inventory Sharing (VISH)

Purpose: Use this menu option to generate the Verify Inventory Sharing Report for a specified sharing warehouse; this report lists the items in the sharing warehouse that are not setup correctly for inventory sharing.

The Inventory Sharing (A69) system control value defines whether a company will fulfill orders from another company’s inventory. When this system control value is selected, the Sharing warehouse and Shared company/warehouse fields appear on the Create, Change, or Display Warehouse screens.

> **Note:**
>
> - The *Shared company and warehouse* is the company and warehouse that contains the actual inventory. This is the company and warehouse that shares inventory with other warehouses in other companies. In this company, you select the Sharing warehouse field for the shared warehouse.
> - The *Sharing company and warehouse* is the company and warehouse that does not contain inventory, and instead, points to the shared company and warehouse. In this company, you set the Shared company/ warehouse fields for the sharing warehouse; these fields correspond to the actual shared warehouse in the other company.

Setup for inventory sharing: Setup for sharing the inventory in a company with one or more other companies is described in the table below.

Setup	Example
System control value: Select the Inventory Sharing (A69) system control value in all companies to participate in inventory sharing, including both the company where you actually maintain the inventory and the company(ies) to share the inventory.	Select the Inventory Sharing (A69) system control value in company 1 (shared company, where you actually maintain the inventory) and company 2 (sharing company).
Shared warehouse: In the warehouse in the shared company, select the Sharing warehouse field. Do not set the Shared company/warehouse in the sharing company.	Warehouse 10 is the actual warehouse in company 1. Set the Sharing warehouse flag in warehouse 10 of company 1.
Sharing warehouse(s): In the sharing company(ies): Set the Shared company/ warehouse fields for the virtual warehouse which corresponds to the actual warehouse. Leave the Sharing warehouse field unselected.	Warehouse 10 of company 2 is a virtual warehouse. In warehouse 10 of company 2, set the Shared company/warehouse to 1 and 10.

> **Note:**
>
> You should use the same warehouse number for the warehouse in the shared company and the virtual warehouse(s) in the sharing company(ies).

Setup	Example
Locations: Create the same location(s) in the actual warehouse in the shared company and the virtual warehouse in the sharing company.	Create location A010101 in warehouse 10 of company 1 and warehouse 10 of company 2.
Items: Create the same item(s) in the shared company and in the sharing company, with consistent item warehouse and item location records across the companies.	Item AB100 has a default warehouse of 10 and primary location of A010101 in both company 1 and company 2.

Verify Inventory Sharing Screen

Use this screen to generate the Verify Inventory Sharing Report for a specified sharing warehouse; this report lists the items in the sharing warehouse that are not setup correctly for inventory sharing.

> **Note:**
>
> The *sharing warehouse* is the warehouse in the company that does not contain the actual inventory. This is the warehouse whose Shared company/warehouse fields contain the company and warehouse that contains the actual inventory. If you generate the Verify Inventory Sharing report from the company and warehouse that shares inventory, the report will be blank.

How to display this screen: Enter VISH in the *Fast path* field or select Verify Inventory Sharing from a menu.

Field	Description
Enter warehouses	Enter a code for the warehouse you wish to verify is setup for inventory sharing. *Numeric, 3 positions. required.*

Instructions: Enter a warehouse code in the *Enter warehouse* field that represents a sharing warehouse and select OK.

- If the Shared company/warehouse fields for the warehouse are blank, a message similar to the following displays: `Warehouse 1 does not share inventory with another warehouse.`
- If the Shared company/warehouse fields for the warehouse are populated, the system submits the VFY_INV_SH job, which generates the Verify Inventory Sharing Report. This report lists the items that are not set up correctly for inventory sharing.

For more information: See the description of the Inventory Sharing (A69) system control value for more information on inventory sharing.

Item Where Used

Topics in this part: The following topics describe the finished good explosion functions and the reports they produce.

- Where Finished Good Component Item Usage (MKCU) defines the purpose of this function, displays the Where F. Good Component Item Usage screen, and explains the sample report.
- Where Set Component Item Usage (MSCU) defines the purpose of this function, displays the Where Set Component Item Usage screen, and explains the sample report.
- Where Variable Set Component Item Usage (MVCU) defines the purpose of this function, displays the Where Variable Set Component Item Usage screen, and describes the sample report.

Explode Finished Good Items (MKEX)

Finished Goods Explosion Screen

How to display this screen: Enter MKEX in the *Fast path* field at the top of any menu or select Explode Finished Good Items from a menu.

Field	Description
Warehouse	Defaults from the Default Warehouse (A04) system control value. Warehouse codes are validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS). *Numeric, 3 positions, required.*
Selection option	Enter the number of the orders to include on the report. Valid values: • **Include only open orders** • **Include both open and held orders** *Required.*

Where Finished Good Component Item Usage (MKCU)

Where Finished Good Component Item Usage Screen

How to display this screen: Enter MKCU in the *Fast path* field at the top of any menu or select Where Finished Good Component Item Usage from a menu.

Field	Description
Component item	The item number and, if applicable, the SKU. The system validates this number against the Item table. The system also checks to be sure that the entered item is a component of at least one finished good. If the item is not a component, an error message similar to the following indicates: `Kit component item (MTNS RED SMLL) does not exist.` *(Item) Alphanumeric, 12 positions; required.* *(SKU) Alphanumeric; three 4-position fields; required if item has SKU.*

Where Set Component Item Usage (MSCU)

Purpose: Use this option to generate the Where Set Component Item Used Report, which provides a listing of all sets that use the component item you specified.

Where Set Component Item Usage Screen

How to display this screen: Enter MSCU in the *Fast path* field at the top of any menu or select Where Set Component Item Usage from a menu.

Field	Description
Component item	The item number and, if applicable, the SKU to include on the Where Set Component Item Used Report. The system validates this number against the Item table. The system also checks to be sure the entered item is a component of at least one set. If the item is not a component, an error message similar to the following indicates: `Kit component item (MTNS RED SMLL) does not exist.` *(Item): Alphanumeric, 12 positions; required.* *(SKU): Alphanumeric, 3 4-position fields; required if the item has a SKU.*

Completing this screen: Enter to item to include on the Where Set Component Item Used Report and select Accept.

Where Variable Set Component Item Usage (MVCU)

Purpose: Use this option to generate the Where Variable Set Component Used Report, which provides a list of all variable sets that use the component item you specified.

Where Variable Set Component Usage Screen

How to display this screen: Enter MVCU in the *Fast path* field at the top of any menu or select Where Variable Set Component Item Usage from a menu.

Field	Description
Component item	The item number and, if applicable the SKU to include on the Where Variable Set Component Used Report. The system validates this number against the Item table. The system also checks to be sure the item is a component of at least one variable set. If the item is not a component, an error message similar to the following indicates: `Variable set component item (MTNS RED SMLL) does not exist.` *(Item): Alphanumeric, 12 positions; required.* *(SKU): Alphanumeric, 3 4-position fields; required it the item takes a SKU*

Purchase Order Receipts

Topics in this part: The following topics describe the functions available when using receiving merchandise from your vendors.

- Purchase Order Receiving Overview describes the options available when receiving purchase orders, explains how the system determines the cost of an item and how the Suggest Warehouse Placement function works, and shows you how to locate the function.
- Working with P/O In Transit Information (MPIT) shows you how to quickly update a purchase order with shipping information.
- Selecting Purchase Orders for Receipt (PORC) shows you how to enter the purchase order number you want to post receipts against, and how to scan for open purchase orders.
- Receiving Purchase Orders (PORC) describes the various methods of posting receipts to a purchase order, shows you how to post receipts using each of the available methods, and describes each of the options available in PO receipts.
- Placing Suspended Stock (SUSP) shows you how to transfer merchandise from suspense to inventory.

Purchase Order Receipts (PORC)

For information on:	See:
the options available when receiving purchase orders, how the system determines the cost of an item, and how the Suggest Warehouse Placement function works (overview)	Purchase Order Receiving Overview
selecting purchase orders for receipt, including scanning options	Selecting Purchase Orders for Receipt (PORC)
available options for posting receipts	Receiving Purchase Orders (PORC)

Working with P/O In Transit Information (MPIT)

Purpose: The Work With P/O In Transit Information function provides a fast path method to update a purchase order with information about incoming shipments from your vendors. You can quickly update the purchase order with the:

- quantity of an item in transit
- date an item is due from the vendor
- date you will cancel an item if it has not been received
- date you can promise an item to your customers.

The Purchase Order Detail table is updated with the information entered here. This information can also be updated using the PO Maintenance - Change PO Detail screen. It can be viewed using the Display PO Detail screen. See Maintaining Purchase Orders (MPOE) and Purchase Order Inquiry (MPOI).

In this topic:

- Purchase Orders In Transit Select Prompt Screen
- Update In Transit Information Screen

Purchase Orders In Transit Select Prompt Screen

Purpose: Use this screen o select the purchase order you want to update. You can enter the purchase order number or you can use the prompt function to display a list of purchase orders on the system.

How to display this screen: Enter MPIT in the *Fast path* field at the top of any menu or select Maintain PO In-Transit Information from a menu.

Field	Description
PO #	Enter the number of the purchase order you want to update in the *PO#* field to display the Update In Transit Information Screen. The purchase order number entered is validated against the Purchase Order table. *Numeric, 7 positions; required.*

Update In Transit Information Screen

Purpose: This screen displays each line item on the selected purchase order and is used to update the quantity in transit, the cancel date, the due date or the promise date for a line item that has not yet been received.

How to display this screen: Select a purchase order number at the Purchase Orders In Transit Select Prompt Screen.

Field	Description
Lin (Line #)	The purchase order line number. *Numeric, 3 positions; optional.*
Sts	The status of the line. Valid status codes are: O - Open X - Closed C - Canceled *Alphanumeric, 1 position; optional.*
Item	The code of the item ordered on the purchase order line. *Alphanumeric, 12 positions; optional.*
Clr/Size/Wdth	The SKU elements, which further define the item. *Alphanumeric, three 4-position fields; optional.*
Open	The number of units of the item due from the vendor. *Numeric, 7 positions; display only.*

Field	Description
Transit	The number of units that are due to arrive from the vendor. Enter an amount in this field when the vendor confirms the quantity that has been shipped. The *Transit qty (Transit quantity)* field in the Purchase Order Detail record will be updated. *Numeric, 7 positions; optional.*
Cancel	The user-defined date when the purchase should be canceled if you have not received the items, or confirmation that the items have been shipped. The Cancel date from the Purchase Order Detail table is indicated if one exists. Enter a new cancel date if applicable. The *Cancel date* in the Purchase Order Detail table will be updated. *Numeric, 9 positions; optional.*
Due	The user-defined date when the item is due from the vendor. The Due date from the Purchase Order Detail table is indicated if one exists. Enter a new due date if applicable. The *Due date* in the Purchase Order Detail table will be updated. *Numeric, 9 positions; optional.*
Promise	The user-defined date after which the item can be committed to customers. The Promise date from the Purchase Order Detail table is indicated if one exists. Type a new promise date if applicable. The *Promise date* in the Purchase Order Detail table will be updated. *Numeric, 9 positions; optional.*

Instructions:

1. Scan for the line item you wish to update using the fields at the top of the screen, or use the Scroll keys to scroll forward and backward through the purchase order lines.
2. Enter the number of units that have been shipped but not received in the *Transit* field.
3. Enter a new cancel date in the *Cancel* field, if applicable.
4. Enter a new due date in the *Due* field, if applicable.
5. Enter a new promise date in the *Promise* field, if applicable.
6. Continue with the above steps until all applicable lines have been updated.

Placing Suspended Stock (SUSP)

Purpose: Use Place Suspended Stock to transfer inventory from suspense to actual locations in your warehouse. Generally, you transfer inventory from suspense to inventory when your quality assurance is complete and you have decided where the inventory should be placed.

You can use Suggest Location Placement (MSLO) to have the system recommend the locations to place the merchandise being transferred from suspense. You can override the system recommended locations if necessary. The Suggest Location Placement (A27) system control values determine how the system suggests locations.

You can print bar-coded labels listing the placement quantity and location. The Labels at PO Receipts (C16) system control value controls whether labels will print at this time.

If suspended items are defective or if they are being returned to the vendor, you can still transfer them from suspense and place them into inventory so that you can track damaged inventory and inventory that is being returned to the vendor. You can place these items in a defective warehouse or a non-reservable warehouse to exclude them from your active inventory, if necessary.

When you place suspended stock, the system:

- decreases the quantity of the item in suspense
- increases the on-hand quantity of the item
- creates an Inventory Transaction History record
- performs vendor item analysis

In this topic:

- Suspense Placement Screen
- Suspense Placement By Item Screen
- Suspense Placement By PO Screen
- Suspense Placement By PO Control # Screen

Suspense Placement Screen

Purpose: Use this screen to select the suspended items you want to place. You can select items by item code, purchase order number or purchase order receipt control number.

How to display this screen: Enter SUSP in the *Fast path* field at the top of any menu or select Place Suspended Stock from menu.

Field	Description
By item	The code of the item in suspense. *Alphanumeric, 12 positions; optional.*
By P/O #	The number of the purchase order the items in suspense were received against. *Numeric, 7 positions; optional.*
By P/O control #	The receipt control number, or batch number, assigned to the purchase order containing items that were received into suspense. *Numeric, 7 positions; optional.*

Instructions: To select items in suspense for placement:

- By item code: Enter the item code in the *By item* field. Each suspended receipt for the item is in purchase order number sequence on the Suspense Placement By Item Screen. The following message indicates if there are no suspended receipts for the item:

  ```
  No SKUs to place for item. Please reenter.
  ```

- By purchase order number: Enter the purchase order number in the *By P/O #* field. Each suspended item on the purchase order is in item code sequence on the Suspense Placement By PO Screen. The following message indicates if there are no suspended receipts for the purchase order:

```
No items to place for PO# XXX.
```

- By receipt control number: Enter the control number in the *By P/O control #* field. Each suspended item in the batch is in item code sequence on the Suspense Placement By PO Control # Screen. The following message indicates if there are no suspended receipts for batch:

```
No items to place for P/O Control # 2.
```

Suspense Placement By Item Screen

Purpose: This screen displays all suspended receipts for the item in purchase order number sequence. This screen is used to record the quantity that is being transferred to inventory and the warehouse and location where the stock will be placed.

> **Note:**
>
> If suspended items are defective, or if they are being returned to the vendor, they must still be transferred from suspense and placed into inventory. You can place these items in a defective warehouse or a non-reservable warehouse to exclude them from your active inventory if necessary.

How to display this screen: Enter an item code in the *By item* field on the Suspense Placement Screen.

Field	Description
P/O #	The number of the purchase order the suspended item was received against. *Numeric, 7 positions; display-only.*
SKU	The item's unique characteristics, such as its color and size. Your company can give these fields some other name. *Alphanumeric, three 4-position fields; optional.*
Suspense	The number of units of the item received against the purchase order that are currently in suspense. *Numeric, 7 positions; display-only.*
Placed	The number of units you are transferring from suspense. *Numeric, 7 positions; required.*
Whs	The code of the warehouse where you are placing the suspended stock. The warehouse code is defined in and validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS). Leave this field blank if you are placing the inventory in more than one warehouse; you will advance to the Work with PO Receipt Locations Screen. *Numeric, 3 positions; optional.*

Field	Description
Location	The code of the location where you are placing the suspended stock. The Confirm Location Creation pop-up window opens if you enter a new primary location code for an item and the Allow Multiple Primary Item Locations (D12) system control value is set to CONFIRM. Leave this field blank if you are placing the inventory in more than one warehouse; you will advance to the Work with PO Receipt Locations Screen. The system may update the item's primary location in the SKU table (the "primary primary") depending on the setting of the Update Primary Primary Location for Item During Receiving (I35) system control value. See that system control value for more information. *Alphanumeric, 7 positions; optional.*
Disp locs	The system displays a plus (+) sign in this field if you have defined more than one location for the item on the Work with PO Receipt Locations Screen. *Alphanumeric, 1 position; display-only.*

Screen Option	Procedure
View, add or delete location placements for an item	Select Work with Locations for an item to advance to the Work with PO Receipt Locations Screen.
Enter serial numbers for a suspended item	Select Serial #s for the item to advance to the Enter Serial Numbers Screen . This option is available only after you have entered a quantity to place, and only for items flagged as serial numbered items.
Accept the suspense placements	Select Accept.
Reject the suspense placements	Select Reject. A pop-up window opens for you to confirm or cancel the reject request.

Instructions: To transfer items from suspense.

To place merchandise in one warehouse location:

1. Enter the quantity of the item you are transferring from suspense in the *Placed* field. The quantity entered cannot exceed the *Suspense* quantity, or the following message indicates: `Invalid placement quantity.`
2. Enter the code of the warehouse where you will be placing the stock in the *Whs* field. The following message indicates if an invalid warehouse code is entered: `Warehouse XXX does not exist.`
3. Enter the code of the warehouse location where you will be placing the stock in the *Location* field. The following message indicates if an invalid location code is entered: `Location does not exist.`
4. The Confirm Location Creation pop-up window opens if you enter a new primary location code for an item and the Allow Multiple Primary Item Locations (D12) is set to CONFIRM. Confirm the creation of the new primary location, or select Exit to cancel.

5. Continue with the above steps until all item quantities have been marked for placement.
6. Optionally, select Serial #s for an item to advance to the Enter Serial Numbers Screen. This screen is available only for items whose *Serial numbers* field is selected. You are required to enter a serial number for each unit of the item you are placing; see the next step.
7. Select Accept to accept your placements. The quantities will be transferred from suspense to the designated warehouses and locations. If you are placing a serial numbered item and have not yet entered a serial number for each unit you are placing, you advance automatically to the Enter Serial Numbers Screen.
8. An error message similar to the following indicates that you selected Accept to accept your placements and another user is processing placements for the same purchase order: `Suspense record for TS98 has been changed by another user.`
9. Select Reject to reject your placements.

To place merchandise in more than one location or warehouse:

1. Enter the quantity of the item you are transferring from suspense in the *Placed* field. The quantity entered cannot exceed the *Suspense* quantity, or the following message indicates: `Invalid placement quantity.`
2. Select Work with Locations for the item to display the Work with PO Receipt Locations Screen.
3. Optionally, select Serial #s for an item to advance to the Enter Serial Numbers Screen This screen is available only for items whose *Serial numbers* field is selected. You are required to enter a serial number for each unit of the item you are placing.
4. Continue with the above steps until all item quantities have been marked for placement.
5. Select Accept to accept your placements. The quantities will be transferred from suspense to the designated warehouses and locations. If you are placing a serial numbered item and have not yet entered a serial number for each unit you are placing, you advance automatically to the Enter Serial Numbers Screen.
6. An error message similar to the following indicates that you selected Accept to accept your placements and another user is processing placements for the same purchase order: `Suspense record for TS98 has been changed by another user.`
7. Select Reject to reject your placements.

To use the Suggest Location Placement function:

1. Enter the quantity of the item you are transferring from suspense in the *Placed* field. The quantity entered cannot exceed the *Suspense* quantity, or the following message indicates: `Invalid placement quantity.`
2. Select Work with Locations for the item to display the Work with PO Receipt Locations Screen.
3. Continue with the above steps until all item quantities have been marked for placement.
4. Select Accept to accept your placements. The quantities will be transferred from suspense to the designated warehouses and locations.

5. An error message similar to the following indicates that you selected Accept to accept your placements and another user is processing placements for the same purchase order: `Suspense record for TS98 has been changed by another user.`
6. Select Reject to reject your placements.

Suspense Placement By PO Screen

Purpose: This screen displays all suspended items on a purchase order in item code sequence. Use this screen to record the quantity you are placing and the warehouse and location where the stock will be placed.

> **Note:**
>
> If suspended items are defective, or if they are being returned to the vendor, they must still be transferred from suspense and placed into inventory. You can place these items in a defective warehouse or a non-reservable warehouse to exclude them from your active inventory if necessary.

How to display this screen: Enter a purchase order number in the *By PO#* field on the Suspense Placement Screen.

About this screen: Each field on this screen, available options, and how to complete this screen are described under:

- Suspense Placement Screen and Suspense Placement By Item Screen for field descriptions
- Suspense Placement By Item Screen for available options and step-by-step instructions

Suspense Placement By PO Control # Screen

Purpose: This screen displays all suspended items in a receipt batch in item code sequence. Use this screen to record the unit quantity you are placing and the warehouse and location where the stock will be placed.

> **Note:**
>
> If suspended items are defective, or if they are being returned to the vendor, they must still be transferred from suspense and placed into inventory. You can place these items in a defective warehouse or a non-reservable warehouse to exclude them from your active inventory if necessary.

How to display this screen: Enter a purchase order receipt control number in the *By PO Control #* field on the Suspense Placement Screen.

About this screen: Each field on this screen, available options, and how to complete this screen are described under:

- Suspense Placement Screen and Suspense Placement By Item Screen for field descriptions
- Suspense Placement By Item Screen for available options and step-by-step instructions

Managing Warehouses

Topics in this part: The following topics describe the functions available from the Warehouse Management menu. These functions are used to define your warehouses, establish warehouse locations and assign inventory, and analyze your current warehouse utilization.

- Creating and Maintaining Warehouses (WWHS) shows you how to establish each of your warehouses on the system. In addition, this topic explains how to define the warehouse sequence to use when you fulfill customer orders from more than one warehouse.
- Creating and Maintaining Location Classes (WLCL) explains how location classes can be used to define the type of merchandise that will be stored in a warehouse location.
- Creating and Maintaining Locations (WLOC) shows you how to define the locations in the warehouse where merchandise is stored. Warehouse locations can be comprised of a series of zone, aisle, shelf, and bin indicators, or they can be free-form user-defined location codes.
- Using the Location Generator (MLOC) explains how to use the automated location generator to create multiple warehouse locations at the same time.
- Creating Item Warehouse/Locations (MIWL) shows you how to assign an item to a warehouse location or change existing item location information, or change existing item warehouse information.
- Suggest Location Placement (MSLO) describes how to use the Suggest Warehouse Placement function to have the system determine the warehouse location where an item should be stored.
- Creating and Maintaining Item Warehouses describes how to assign items to a warehouses and how inventory history is captured for each item at the warehouse level.
- Working with Default Warehouse Locations (WWDL) describes how to create and work with the default locations the system checks automatically for certain inventory transactions.
- Pending Putaway Overview describes the updates the system performs when you place inventory into a pending putaway warehouse.

Creating and Maintaining Warehouses (WWHS)

Purpose: You can use the Work with Warehouses function to create, change, delete, or display warehouse information. A warehouse is required for each physical and logical warehouse in which you track inventory.

A logical warehouse can be:

- a section of a physical warehouse that is treated as if it were a separate warehouse. For example, if you have inventory in one building that is both a retail store and a mail order fulfillment center, you can establish this building as two separate warehouses to track retail and mail order inventory separately. Or, you might have areas in the warehouse where defective merchandise and merchandise that will be returned to the vendor is stored.

- a means to track inventory that is not kept in a warehouse; for example, you can map a logical warehouse to a retail outlet, or to represent stock that is in transit between warehouses.

> **Note:**
>
> Inventory reservation takes place at the warehouse level. Maintain separate warehouses for defective merchandise and merchandise that you are returning to the vendor, so that these quantities are not included in inventory reservation.

Additionally, you can use this function to:

- create and maintain retail store information for a warehouse that represents a retail store.
- use the Working with Warehouse Lists (WWHL) to create, change, delete, or display the sequence in which warehouses will be selected to fulfill orders if you ship merchandise from more than one warehouse.
- use the Work with Item Warehouse Screen to create, change, delete, or display item warehouse assignments.

In this topic:

- Work with Warehouses Screen
- Create Warehouse Screen
- Change Warehouse Screen
- Display Warehouse Screen
- Work with Warehouse Devices Screen
- See Working with Warehouse Lists (WWHL)

Work with Warehouses Screen

How to display this screen: Enter WWHS in the *Fast Path* field at the top of any menu, or select Work with Warehouses from a menu.

Field	Description
Warehouse	A number that identifies the warehouse. *Numeric, 3 positions; optional.*
Name	The name of the warehouse. *Alphanumeric, 30 positions; optional.*
Store	This field indicates whether the warehouse represents a retail store rather than a true warehouse. Valid values are: • selected = The warehouse represents a retail store. • unselected = The warehouse does not represent a retail store.

Field	Description
Allocatable	This field indicates whether you can reserve inventory from the warehouse. Valid values: • selected = the warehouse is allocatable. • unselected = the warehouse is not allocatable. If a warehouse is not flagged as allocatable, its on-hand quantity is not included in the availability calculation for items; also, it is not included in the product import to Order Orchestration when the Send Inventory by Warehouse to OROB (L06) system control value is unselected.
O/E (Order entry)	This field indicates whether inventory availability can be viewed in Order Entry. • selected = inventory availability is displayed in Order Entry. • unselected = inventory availability does not display in Order Entry.
Telephone #	The telephone number at the warehouse. *Numeric, 14 positions; display-only.*

Screen Option	Procedure
Create a new warehouse	Select Create to advance to the Create Warehouse Screen.
Change warehouse information	Select Change for a warehouse to advance to the Change Warehouse Screen.
Delete a warehouse	Select Delete for a warehouse to delete it.
Display warehouse information	Select Display for a warehouse to advance to the Display Warehouse Screen.
Work with warehouse device	Select Devices for a warehouse to advance to the Work with Warehouse Devices Screen.
Work with item warehouse	Select Items for a warehouse to advance to the Work with Item Warehouse Screen.
Work with user defined fields	Select User Field for a warehouse to advance to the Work with User Fields Screen.
Work with warehouse lists	Select Warehouse List for a warehouse to advance to the Working with Warehouse Lists (WWHL).

Create Warehouse Screen

To create: At the Work with Warehouses Screen, select Create.

Field	Description
Warehouse	A code to identify the warehouse. *Numeric, 3 positions.* *Create screen: required.* *Change screen: display-only.*
Name	The name of the warehouse. *Alphanumeric, 30 positions; required.*

Field	Description
Address	The address of the warehouse. *Alphanumeric; three lines, 31 positions each; optional.*
City	The city where the warehouse is located. *Alphanumeric, 25 positions; required.*
State	The code representing the state or province where the warehouse is located. See Setting Up the Country Table (WCTY). The system validates that the state you enter is assigned to the SCF in the first three positions of the postal code. *Alphanumeric, 2 positions; optional.*
Zip code	The zip code or postal code where the warehouse is located. See Setting Up the Zip/City/State (Postal Code) Table (WZIP). *Alphanumeric, 25 positions; optional.*
Country	The country where the warehouse is located. Country codes are validated against the Country Code table. See Setting Up the Country Table (WCTY). *Alphanumeric, 3 positions; optional.*

Field	Description
Drop point	The shipping point associated with the warehouse, or carrier pick-up point. The drop point is used in determining the correct destination UPS zone for a shipment in relation to the warehouse or carrier pick-up point from which it is shipped, and ultimately the shipping charge for the order. The code is validated against the Drop Point table. Example: If you have a warehouse in Boston and a warehouse in Chicago, the UPS zone assignments will be different for each warehouse. If you ship an order from Boston to Los Angeles, Los Angeles is zone 8 in relation to Boston. If you ship an order from Chicago to Los Angeles, Los Angeles is Zone 4 in relation to Chicago. By assigning different drop points to each warehouse, you can establish the correct UPS zones for each warehouse and have the correct meter charges calculated. The drop point also represents a carrier pick-up point when zone skipping is used. In zone skipping, orders are shipped from your warehouse to a UPS pick-up point by another carrier. The UPS zone to which the orders are shipped and the meter charges are determined in relation to the carrier pick-up point, and not your warehouse. Example: If your warehouse is located in Boston, you may ship your west coast orders via common carrier to a UPS pick-up point in Chicago, and then ship the orders via UPS from Chicago to their final destination. The UPS zone and the meter charges must be based upon the zone assignments for Chicago even though your warehouse is actually located in Boston. **Note:** If you are using the *Freight by order weight* freight method, the drop point for the warehouse must match the drop point for the SCF/Ship Via on the order. See Working with Weight Tables for Order Weight (WFTB). The drop point field is required even if you have only one warehouse and are not using zone skipping.

Field	Description
	Numeric, 3 positions; required.
Manager	The name of the warehouse manager. *Alphanumeric, 30 positions; optional.*
Telephone #	The telephone number of the warehouse. You can define a telephone number format to map to the phone numbers you enter into the system. The system defaults the telephone number formats for the Default Country for Customer Address (B17) for any phone number entered on this screen. See Setting Up the Country Table (WCTY). *Numeric, 11 positions; optional.*
Fax #	The fax number of the warehouse. See the *Telephone number* field description above for information on telephone number formats. *Numeric, 11 positions; optional.*
Allocatable flag	The allocatable flag indicates whether merchandise in the warehouse can be reserved to fulfill consumer orders. Valid values are: • Selected = merchandise in this warehouse can be reserved to fulfill orders. The inventory reservation program considers inventory quantities in the warehouse when evaluating whether merchandise is available for shipment. • Unselected = merchandise in the warehouse will not be used to fulfill orders. Examples of non-allocatable warehouses include non-saleable and defective item warehouses. If a warehouse is not flagged as allocatable, its on-hand quantity is not included in the availability calculation for items. This field also controls whether the system displays item availability for the warehouse on the Display Item Availability Screen; also, a non-allocatable warehouse is not included in the product import to Order Orchestration when the Send Inventory by Warehouse to OROB (L06) system control value is unselected.
Viewable in O/E (Viewable in Order Entry)	This flag indicates whether inventory availability for the warehouse can be viewed in Order Entry. When you view item availability in Order Entry, a list of all viewable warehouses and the item quantity available in each warehouse is displayed. Valid values are: • Selected = inventory quantities in this warehouse can be viewed in Order Entry. • Unselected = inventory quantities in this warehouse cannot be viewed in Order Entry.

Field	Description
OROB location	The code that identifies the warehouse to Order Orchestration as a location. If this code matches the location code set up in Order Orchestration and if the Send Inventory by Warehouse to OROB (L06) system control value is selected: • Order Administration sends inventory information for each item flagged as OROB eligible if it has a record in this warehouse when a system import is initiated in Order Orchestration. • The BROKER process in Working with Integration Layer Processes (IJCT) sends fulfillment requests to Order Orchestration requesting any new retail pickup or delivery orders assigned to this warehouse for fulfillment. **Note:** If the Send Inventory by Warehouse to OROB (L06) system control value is selected but you do not define an OROB location here, fulfillment requests for the warehouse are not sent to Order Orchestration. If the Send Inventory by Warehouse to OROB (L06) system control value is unselected, then these activities are aggregated under the OROB Default Location (K51), and item warehouse records are included only if the warehouse is flagged as allocatable. See Order Orchestration's Product, Product Location, and Incremental Inventory Import Process for an overview and examples. If the location code set up in Order Orchestration contains any non-numeric characters, they should be uppercase. *Alphanumeric, 10 positions; optional.*
The Sharing warehouse and Shared company/warehouse fields appear only if the Inventory Sharing (A69) system control value is selected.	N/A

Field	Description
Sharing warehouse	This field indicates whether the warehouse serves as a sharing warehouse for orders you take in another company. Valid values are: • Selected = This warehouse provides inventory to fulfill orders you take in another company. • Unselected (default) = This is not a sharing warehouse
Shared company/warehouse	These fields indicate whether to reserve and fulfill orders from a different warehouse in a different company. **Company** The company where the sharing warehouse (the warehouse that provides the inventory) is located. Company codes are defined in and validated against the Company table; see Working with Companies (WCMP). *Numeric, 3 positions; optional.* **Warehouse** The warehouse in the company, specified in the Company field, that is providing the inventory to fulfill orders against the current company and warehouse. *Numeric, 3 positions; optional.*

Change Warehouse Screen

To change: Select Change for the warehouse at the Work with Warehouses Screen to advance to the Change Warehouse screen. At this screen you can change any information except the warehouse code. See the Create Warehouse Screen for field descriptions.

Display Warehouse Screen

To display: Select Display for a warehouse at the Work with Warehouses Screen to advance to the Display Warehouse screen. You cannot change any information on this screen. See Create Warehouse Screen for field descriptions.

Work with Warehouse Devices Screen

Purpose: Use this screen to define the default pick slip, and report output devices for a warehouse.

How to display this screen: Select Devices a warehouse on the Work with Warehouses Screen.

Field	Description
Type	The type of output device. Valid values are: • **Pick Output Queue** • **Report Output Queue** *Optional.*

Field	Description
Description	The description of the device type. Types and descriptions are system-defined. *Alphanumeric, 25 positions; display-only.*
Device	The name of the output device. *Alphanumeric, 10 positions; optional.*

Screen Option	Procedure
Create a new warehouse device	Select Create to advance to the Create Warehouse Device Window. At this window, you can enter the device type and name. See above for field descriptions.
Change warehouse device information	Select Change for a warehouse device to advance to the Change Warehouse Device Window. At this window, you can change the device name. See above for more information.
Delete a warehouse device	Select Delete for a warehouse device to delete it.

Working with Warehouse Lists (WWHL)

Warehouse lists are used to more efficiently allocate an order when you ship from more than one warehouse.

Each list contains the warehouse codes of the warehouses the system will use to fulfill an order, and the sequence in which the warehouse will be considered. A warehouse list is usually created for each region to which you ship.

> **Important:**
>
> To use warehouse lists to consolidate reserve warehouses for an order you must select the Ship Complete from 1 Warehouse (B16) system control value.

If you ship from three warehouses, you might use the following shipping strategy to fulfill orders:

Destination	Whs 1	Whs 2	Whs 3
East Coast	New York	Chicago	na
Mid West	Chicago	New York	Los Angeles
West Coast	Los Angeles	Chicago	na

For orders being shipped to the East Coast, the New York warehouse would be the first warehouse on the list. For orders being shipped to West Coast, the Los Angeles warehouse would be the first warehouse on the list.

> **Note:**
>
> The Warehouse list is assigned in the SCF table. The system uses the country code/SCF combination to determine which warehouse list to use. If a postal code is not defined for the order ship to address on the order, the system uses the warehouse list defined for the country code/# combination. See Create SCF Screen.

Warehouse List Logic: Warehouse lists are used to arrive at warehouse ranking, and warehouse ranking determines which warehouse an item will be reserved (and shipped) from. If two warehouses have equal rank, then the first warehouse on the list is used to reserve the item.

When you enter an order line for an item, the system checks all the warehouses on the warehouse list. Each warehouse that can fulfill the order is given 1 ranking point; no ranking points are given for the ability to partially fulfill an order line. Ranking points for each warehouse accumulate as you add order lines to the order.

Warehouse rank does not apply to order lines for inventory which is completely unavailable in all warehouses, however. If an order line is completely unavailable in all warehouses, the system backorders it in the first warehouse on the warehouse list, regardless of warehouse rank.

Example 1:

Line 1: For an order being shipped to the east coast, you enter item AB1111. The item is available in both the New York warehouse and the Chicago warehouse, so both warehouses would receive 1 ranking point. Because both warehouses have the same rank, item AB1111 would be reserved in the New York warehouse, because it is the first warehouse on the list:

First order line: item AB1111	First order line: item AB1111	First order line: item AB1111
Warehouse List	**Rank**	**Reserve Warehouse?**
New York	1	YES
Chicago	1	na

Line 2: The next item you add to the order is AB2222. The item is available only in the Chicago warehouse, so only the Chicago warehouse would receive a second ranking point. The time would be reserved from the Chicago warehouse.

Second order line: AB2222	Second order line: AB2222	Second order line: AB2222
Warehouse List	**Rank**	**Reserve Warehouse?**
New York	1	na
Chicago	1 + 1 = 2	YES

Line 3: The third item you add to the order is AB3333. The item is available in both the New York and the Chicago warehouses, so both warehouses receive an additional ranking point. The item is reserved from the Chicago warehouse (even though the New York warehouse is the first on the list) because the Chicago warehouse has a higher rank.

Third order line: AB3333	Third order line: AB3333	Third order line: AB3333
Warehouse List	**Rank**	**Reserve Warehouse?**
New York	1 + 1 = 2	na
Chicago	2 + 1 = 3	YES

For the complete order in Example 1, the first order line would be reserved in the New York warehouse, and the second and third order lines would be reserved in the Chicago warehouse.

Example 2:

For the same order, if you entered the lines in a different sequence, the results would differ.

Line 1: If the first item you add to the order is AB2222, it will be reserved in the Chicago warehouse, because it is available only in the Chicago warehouse.

First order line: AB2222	First order line: AB2222	First order line: AB2222
Warehouse List	**Rank**	**Reserve Warehouse?**
New York	0	na
Chicago	1	YES

Line 2: The next item you add to the order is AB1111. The item is available in both the Chicago and New York warehouses, so each warehouse would receive an additional ranking point. The line would be reserved from the Chicago warehouse.

Second order line: AB1111	Second order line: AB1111	Second order line: AB1111
Warehouse List	**Rank**	**Reserve Warehouse?**
New York	1	na
Chicago	1 + 1 = 2	YES

Line 3: The third item you add to the order is AB3333. The item is available in both the New York and the Chicago warehouses, so both warehouses receive an additional ranking point. The item is reserved from the Chicago warehouse because the Chicago warehouse has a higher rank.

Third order line: AB3333	Third order line: AB3333	Third order line: AB3333
Warehouse List	**Rank**	**Reserve Warehouse?**
New York	1 + 1 = 2	na
Chicago	2 + 1 = 3	YES

Line 4: The fourth item you add to the order is AB4444. The item is completely unavailable in both the New York and the Chicago warehouses, so the system ignores warehouse rank and backorders the item in the New York warehouse, because the New York warehouse is the first warehouse on the list.

Fourth order line: AB4444 (Completely unavailable)	Fourth order line: AB4444 (Completely unavailable)	Fourth order line: AB4444 (Completely unavailable)
Warehouse List	**Rank**	**Reserve Warehouse?**
New York	1 + 1 = 2	YES, because when an item is completely unavailable, the system does not consider rank, but backorders the item in the first warehouse on the list.
Chicago	2 + 1 = 3	na

For the complete order in Example 2, the first three order lines would be reserved in the Chicago warehouse. The fourth line would be backordered in the New York warehouse.

In this topic:

- Warehouse Lists and Single Order Lines
- Warehouse List Overrides
- Work with Warehouse Lists Screen
- Edit Warehouse List Details Screen
- Change Warehouse List Screen

Warehouse Lists and Single Order Lines

Warehouse lists also affect single order lines for which you do not have enough inventory in any single warehouse on the warehouse list or, if you are not using Ship Complete from 1 Warehouse (B16), you do not have enough inventory in the item's primary warehouse to fulfill the order line. If an order line cannot be entirely reserved in one warehouse, no ranking points are given to any warehouses on the warehouse list. The table describes the effect of warehouse lists on single lines:

Ship complete from 1 whs?	Warehouse list defined?	The system will:
Selected	**Yes**	• first attempt to reserve the entire line from one warehouse on the list, using warehouse rank logic. • if no warehouse on the list can fulfill the entire line, reserve as much of the order line as possible from the warehouse with the greatest inventory, then follow warehouse ranking logic to fulfill the remainder of the order line

Ship complete from 1 whs?	Warehouse list defined?	The system will:
Selected	**No**	• attempt to reserve the entire order line from the item's primary warehouse as defined in the Item table. • if the entire order line cannot be fulfilled from this warehouse, the system will reserve as much of the order line as possible and backorder the remaining quantity in the item's primary warehouse.
Unselected	**Yes**	• first attempt to reserve the entire line from the item's primary warehouse as defined in the Item table. See Performing Initial Item Entry (MITM) • if the entire order line cannot be reserved in the item's primary warehouse, reserve as much inventory as possible from the item's primary warehouse, then follow warehouse ranking logic to fulfill the remainder of the order line
Unselected	**No**	• first attempt to reserve the entire line from the item's primary warehouse as defined in the Item table. See Performing Initial Item Entry (MITM) • if the entire order line cannot be reserved in the item's primary warehouse, reserve as much inventory as possible from the item's primary warehouse, then backorder the remaining inventory in the item's primary warehouse.

Warehouse List Overrides

The system assigns warehouses using the following hierarchy:

- **A warehouse code for an individual order line:** If you enter a warehouse code for an individual order line using the Add Line option, the system will use this warehouse to reserve the order line. This warehouse assignment will override all other reserve warehouse logic.
- **A warehouse code entered on the order header:** If you enter a warehouse code in the Whs (Warehouse) field on the Work with Order screen, the system will use this warehouse to reserve all lines on the order. This warehouse assignment will

override all other warehouse assignments except a warehouse code entered for an individual order line.

- **Warehouse list:** If you have not entered a warehouse code for an individual order line, or a warehouse code on the order header, and the Ship Complete from 1 Warehouse (B16) system control value is selected, the system uses the country code/SCF combination in the SCF table to determine which warehouse list to use. If a postal code is not defined for the order ship to address on the order, the system uses the warehouse list defined for the country code/# combination. See Create SCF Screen.
- **The item's primary warehouse:** If no reserve warehouse can be assigned based on individual order lines, a warehouse code entered on the order header, or a warehouse list, the system will reserve the item in the warehouse from the Item table. See Warehouse Lists and Single Order Lines.

Work with Warehouse Lists Screen

Purpose: This screen is used to change, delete, display, or create information about the warehouse sequence to use to allocate an order when you ship from more than one warehouse.

How to display this screen: Select Warehouse List at the Work with Warehouses Screen. You can also display this screen by entering WWHL in the *Fast path* field at the top of any menu, or by selecting Work with Warehouse Lists from a menu.

Field	Description
List	A code that identifies the warehouse list. *Alphanumeric, 3 positions; optional.*
Description	The name of the warehouse list. *Alphanumeric, 30 positions; optional.*

Screen Option	Procedure
Create a new warehouse list	Select Create to advance to the Edit Warehouse List Details Screen.
Change the warehouse list description	Select Change for a warehouse list to advance to the Change Warehouse List Screen.
Delete warehouse list information	Select Delete for a warehouse list to delete it.
Edit warehouse list details	Select Work with List a warehouse list to advance to the Display Warehouse List Screen.
Display warehouse list information	Select Display for a warehouse list to advance to the Display Warehouse List Screen. You cannot change any information on this screen. See the Edit Warehouse List Details Screen for field descriptions.

Edit Warehouse List Details Screen

To create: At the Working with Warehouse Lists (WWHL), select Create to add a new warehouse list, or select Work with List for a warehouse list to add, change, or delete warehouses from the list, change the warehouse sequence, or delete the entire list.

Field	Description
Warehouse list	A user-defined code that identifies the warehouse list. A unique warehouse list is usually defined for each region to which you ship. The Warehouse list code is assigned to each SCF using the Work with SCF function. See Working with Warehouse Lists (WWHL). *Alphanumeric, 2 positions; required.*
Description	The description of the warehouse list. *Alphanumeric, 30 positions; required.*
Position	The sequence number assigned to the warehouse, in ascending order from 1 to 999. Orders are allocated from the warehouse assigned to position 1 first. Orders that cannot be fulfilled from the first warehouse will be allocated from the warehouse in position 2 next, and so on. *Numeric, 3 positions; required.*
Warehouse	The code of the warehouse assigned to the position. Warehouse codes are defined in and validated against the Warehouse table. *Numeric, 3 positions; required.*
Name	The name of the warehouse assigned to the position is indicated when you select OK. *Alphanumeric, 30 positions; display-only.*

Add a warehouse to the list: Enter the *Position* number and *Warehouse* code for the warehouse you want to add to the list. The warehouse description is indicated if a valid warehouse code is entered.

The following message indicates if an invalid warehouse code is entered:

```
Warehouse does not exist.
```

> **Note:**
>
> You should assign position numbers in increments of 10 so that you can easily insert warehouses if necessary, without renumbering each position. For example, if you want to add Warehouse 004 to the list below, and you want to use Warehouse 004 before Warehouse 003, you can assign position 5 to Warehouse 004. The list will be sequenced in the proper order when you select Exit.

Position	Warehouse
01	**001**
10	**003**
Add 05	**004**

Resequence the list: Select Resequence to resequence the position numbers assigned to the warehouses in the list. New position numbers are assigned to the warehouses in the list in sequential order beginning with the first warehouse (e.g., the first warehouse in the list is assigned position 01, the next warehouse in the list is assigned to position 02, and so on).

If you delete a single warehouse (see below) and then select Resequence, the system renumbers the Position. The table below illustrates how the system resequences a warehouse list.

Before selecting Resequence		After selecting Resequence	
Position	**Warehouse**	**Position**	**Warehouse**
1	990	1	990
2	1	2	1
3	993	3	2
4	2	na	na
Delete position 3 (warehouse 993)	Delete position 3 (warehouse 993)	Delete position 3 (warehouse 993)	Delete position 3 (warehouse 993)

Instructions: To edit a warehouse list.

1. Complete the necessary fields.
2. Select Resequence, if desired, to resequence the list if the entries are not in ascending order by position number.
3. Select Delete for any position entry you wish to delete.
4. Select Delete entire list to delete the entire list.

Change Warehouse List Screen

To change: Select Change for a warehouse list at the Working with Warehouse Lists (WWHL) to advance to the Change Warehouse List screen. At this screen you can change only the warehouse list description. See the Edit Warehouse List Details Screen for field descriptions.

Use this screen to change the list description. Use Edit Warehouse List Details Screen to change the warehouse sequence or the warehouses included in the list.

Creating and Maintaining Location Classes (WLCL)

Purpose: You can use the Work with Location Class Screen to create, change, delete, or display warehouse location class information. Location classes are used to identify the type of merchandise that will be assigned to the location, such as jewelry, high-ticket items, fragile items and hazardous items.

Use of location class: During Receiving Purchase Orders (PORC) and Performing Inventory Transactions, the system will verify that the item is being placed in a location that has the same location class as specified in the Loc class (Location class) field for the item. During preparation, the system will print separate picks for each location class. For example, if an order contains two items, each assigned to a different location class (e.g. electronics and jewelry), two pre-generated picks will be created for the order. In Streamlined Pick Slip Generation (WSPS), you can also select to print picks based on location class.

If the Allow Location Class Edit in Inventory Transaction (F86) system control value is selected, the system validates the location class defined for the item against the location class defined for the location during inventory transaction processing; see this system control value for more information.

Location classes are assigned to items in the Item Table. Location classes are assigned to SKUs in the Pick SKU Location Class table. Location classes are assigned to locations in the Location Table. Use of location classes is optional.

In this topic:

- Work with Location Class Screen
- Create Location Class Screen

Work with Location Class Screen

How to display this screen: Enter WLCL in the *Fast path* field at the top of any menu or select Work with Location Classes from a menu.

Field	Description
Class	A code that identifies the location class. *Alphanumeric, 2 positions; optional.*
Description	The description of the location class. *Alphanumeric, 30 positions; optional.*

Screen Option	Procedure
Create a location class	Select Create to advance to the Create Location Class Screen.
Change location class information	Select Change for a location class to advance to the Change Location Class Screen. You can change any information except the location class code. See the Create Location Class Screen for field descriptions.
Delete location class information	Select Delete for a location class to delete it.
Display location class information	Select Display for a location class to advance to the Display Location Class Screen. You cannot change any information at this screen. See the Create Location Class Screen for field descriptions.
Work with locations	Select Work with locations for a location class to advance to the Work with Locations Screen.

Create Location Class Screen

Purpose: Use this screen to create a location class.

How to display this screen: Select Create on the Work with Location Class Screen.

Field	Description
Class	A code that defines the location class. Location classes are used to identify the type of merchandise that will be kept in the location. *Alphanumeric, 2 positions.* *Create screen: required.* *Change screen: display-only.*
Description	The name of the location class. *Alphanumeric, 30 positions; required.*

Creating and Maintaining Locations (WLOC)

Purpose: Use Work with Locations to create, change, delete or display warehouse locations. Locations are used to identify where merchandise is stored in the warehouse.

Location codes identify a specific storage unit in the warehouse and usually consist of a combination of the warehouse zone, aisle, shelf and bin number where the location is situated. The system provides two methods of defining your location codes:

- You can segregate your location codes into zone, aisle, shelf and bin identifiers with a separate field for each value. This method provides for inventory reporting by warehouse zone.
- You can define your location codes using one free form field, with each location code containing from one to seven characters. This method is used when your warehouse is not organized by zones, aisles, shelves and bins.

> **Note:**
>
> If you use the zone/aisle/shelf/bin structure to define your warehouse locations, Using the Location Generator (MLOC) is also available to create warehouse locations.

In this topic:

- Work with Locations Screen
- Create Location Screen
- Work with Items in Location Screen

Work with Locations Screen

How to display this screen: Enter WLOC in the *Fast path* field at the top of any menu or select Work with Locations from a menu.

Field	Description
Whs (Warehouse)	A code that identifies the warehouse where the location exists. *Numeric, 3 positions; optional.*
Loc (Location)	The code that identifies the location. **Note:** In order to properly scan for a location, you must enter a warehouse code in the *Warehouse* field and a full or partial location in the *Location* field. *Alphanumeric, 7 positions; optional.*

Field	Description
Zne (Zone)	The warehouse zone where the location is situated. *Alphanumeric, 2 positions; optional.*
Aisle	The aisle where the location is situated. *Alphanumeric, 2 positions; optional.*
Shlf (Shelf)	The shelf where the location is situated. *Alphanumeric, 2 positions; optional.*
Bin	The bin where the location is situated. *Alphanumeric, 2 positions; optional.*
Loc Type (Location type)	A code identifying the location type. • P = Primary, or main, picking location • S = Secondary location • B = Bulk location • T = Temporary location *Alphanumeric, 1 position; optional.*
Hang/Flat	A code indicating how merchandise is stored in the location. • H = Hanging storage • F = Flat storage • O = Other storage type *Alphanumeric, 1 position; optional.*
Pck (Pickable)	A code indicating whether inventory in the location can be picked to fulfill consumer orders. • selected = indicates the location is pickable. • unselected = indicates the location is not pickable.
Stock Type	A user-defined code that describes the type of merchandise that can be found in the location. **Note:** You must enter the full Stock Type code to scan; partial entry of the code is not allowed. *Alphanumeric, 3 positions; optional.*
Frz (Freeze)	Indicates whether the location and its merchandise are frozen. Valid values are: • Yes = The location is frozen. • No = The location not frozen. If a location is frozen: • Pick Slip Generation ignores the location when determining where inventory should be picked to fulfill an order. See Performing Pick Slip Generation. • Suggest Location Placement (MSLO) ignores the location when suggesting where to place stock.
Frq (Frequency code)	A code that indicates the frequency with which merchandise in the location is picked. Informational only. *Alphanumeric, 1 position; optional.*

Field	Description
Cls (Location class)	A code that identifies the location class. *Alphanumeric, 2 positions; optional.*

Screen Option	Procedure
Create a new location	Select Create to advance to the Create Location Screen.
Change location information	Select Change for a location to advance to the Change Location Screen. At this screen you can change any information except the warehouse code and the location code. See the Create Location Screen for field descriptions.
Delete location information	Select Delete for a location to delete it. A message similar to the following indicates if inventory is assigned to the location: `Item Location records exist - cannot delete location (A010101).`
Display location information	Select Display for a location to advance to the Display Location Screen. You cannot change any information at this screen. See the Create Location Screen for field descriptions.
Work with items in a location	Select Items for a location to advance to the Work with Items in Location Screen.

Create Location Screen

Purpose: Use this screen to define a location.

How to display this screen: Select Create at the Work with Locations Screen.

Field	Description
Warehouse	The warehouse code where the location is being defined. Warehouse codes are validated against the Warehouse table; see Creating and Maintaining Locations (WLOC). *Numeric, 3 positions.* *Create screen: required.* *Change screen: display-only.*

Field	Description
Location	A user-defined code that represents a warehouse location where merchandise is stored. The warehouse location code can consist of a zone/aisle/shelf/bin combination, or it can be any user-defined code. Locations are required for inventory placement and movement. For example, merchandise is stored and picked from specific locations. The location code prints on pick slips and reports. **Note:** If your warehouse locations consist of a warehouse zone, aisle, bin number, and shelf number combination, separate fields are provided for these values. The zone/ aisle/shelf/bin combination must still be entered in this field. *Alphanumeric, 7 positions.* *Create screen: required.* *Change screen: display-only.*

Field	Description
Type	The location type, which determines whether the location is permanent or temporary, and whether merchandise will be replenished to or from the location. **Primary location** The primary, or main locations from which items are picked. An item can be stored in more than one primary location. The system will attempt to keep the primary location fully stocked via the Replenish Primary Locations function. **Secondary location** Secondary locations are generally used for additional storage when the primary location is full. If a secondary location is pickable, the system will allocate from it when the total order quantity cannot be filled (completely) from a primary location. The system will allocate from both the primary and secondary locations when neither location contains enough stock to fulfill the entire order. Secondary locations can be used to replenish primary locations. **Bulk location** Bulk locations are additional storage locations that are generally used to store case lots or cartons that are not broken up at receiving. If a bulk location is pickable, the system will allocate from it when the total order quantity cannot be filled (completely) from either a primary or secondary location. The system will allocate from primary, secondary and bulk locations when none of the locations contain enough stock to fulfill the entire order. Bulk locations can be used to replenish primary locations. **Temporary location** Temporary locations are used to place merchandise that you want recognized as received, before a permanent location is assigned. When stock is moved into a temporary location, the system creates an item/location record. When the on-hand in the item/location reaches zero, the system deletes the item/location record. **Note:** Order Administration will not allocate merchandise from a temporary location even if the location is defined as pickable. In order to allocate stock, you must move the merchandise to a non-temporary, pickable location. *Alphanumeric, 1 position; required.*
Zne (Zone)	A user-defined code to identify the warehouse zone where the location is situated. Assigning zone codes provides for inventory analysis reporting by zone. Zone codes are also used to sort pick slips when the Cart Bin Picking method is used. *Alphanumeric, 1 position; optional.*

Field	Description
Aisle	A user-defined code to identify the warehouse aisle of the location. *Numeric, 2 positions; optional.*
Shlf (Shelf)	A user-defined code to identify the location's shelf number within the aisle. *Alphanumeric, 2 positions; optional.*
Bin	A user-defined code to identify the location's bin number on the shelf. *Alphanumeric, 2 positions; optional.*
Hang/Flat	A code indicating how inventory is stored in the location. • Hang = indicates that inventory in the location is hung. • Flat = indicates that inventory in the location is laid flat, or is stored in a conventional manner. • Other = indicates that inventory is stored in the location in some other manner. *Alphanumeric, 1 position; required.*
Picking Sequence	A user-defined sequence number which is used during Pick Slip Generation to determine the sort of the Batch Pick Sheet. When picking sequence numbers are not assigned, the system sorts the locations alphabetically by Location code. The picking sequence code is used by all pick slip generation methods. The system considers the pick sequence number when sorting picks in a batch if the Sort Picks by Pick Sequence (E89) system control value is selected. *Numeric, 7 positions; optional.*
Bar code #	A system generated sequence number assigned to the location when it is created. The sequence number prints in bar code format on the bin location labels that can be generated during Receiving Purchase Orders (PORC). *Numeric, 7 positions; display only.*
Fill factor	A user-defined percentage value that is used during the Suggest Location Placement program to determine when the location is stocked to capacity. The system evaluates the location capacity entered in the *cubic* field against the fill factor to determine location's true item capacity. Example: A location may be considered filled to capacity when 80% of its cubic volume is consumed because of the shape of the items that are stored in it. The cubic volume of a location may be 100 cubic feet, but may hold only eight items that are 10 cubic feet each because the items are spherical in shape. See Suggest Location Placement (MSLO). **Note:** The system assumes the fill factor is 100% if this field is left blank. *Alphanumeric, 5 positions with a 2- place decimal; optional.*

Field	Description
Pickable location	A code indicating whether inventory can be picked from the location. All other inventory inquiries display pickable and non-pickable quantities. • Selected - indicates that inventory can be picked from the location. • Unselected - indicates that inventory cannot be picked from the location. Bulk locations, or locations where defective merchandise is kept might be defined as non-pickable. Inventory will be reserved from all locations in the warehouse; if all locations are not pickable, it is possible to reserve more inventory than can be picked. In this situation, one of the following will occur: • The Pick Slip Generation program will print pick slips for the total quantity that can be obtained from pickable locations. The item number and the quantity that cannot be picked will print on the Stock Allocation Error Report when the Pick Slip Generation program completes. • Pick slips will be printed for the full reserve quantity using the primary location in the Item table as the picking location. The Let Down Replenishment program will determine the quantity that must be transferred from non-pickable secondary or bulk locations to fulfill the pick slip run and will process an inventory transfer transaction.
Stock type	A user-defined code that describes the type of merchandise that can be found in the location. Examples include DEF (Defective), or RTV (Return to Vendor). This field is informational only. *Alphanumeric, 3 positions; optional.*
Freeze	Indicates whether the location and its merchandise are frozen. Valid values are: • Selected = The location is frozen. • Unselected = The location not frozen. If a location is frozen: • Pick Slip Generation ignores the location when determining where inventory should be picked to fulfill an order. See Performing Pick Slip Generation. • Suggest Location Placement (MSLO) ignores the location when suggesting where to place stock.

Field	Description
Class (Location class)	A user-defined code that identifies the type of merchandise that will be placed in the location. This code is used to restrict the placement of certain item types to specific locations. For example, if the location is defined as a 'Jewelry' location, only items that contain the item type code for 'Jewelry' can be placed in the location. The class code entered is validated against the Location Class table; see Creating and Maintaining Location Classes (WLCL). If the Allow Location Class Edit in Inventory Transaction (F86) system control value is selected, the system validates the location class defined for the item against the location class defined for the location during inventory transaction processing. **Note:** If this field is left blank, only items that have a blank location class can be stored in the location. *Alphanumeric, 2 positions; optional.*
Capacity	**Capacity**
Units	The total number of units that can fit in the location. *Numeric, 7 positions; optional.*
Weight	The total weight the location can hold, expressed in whole pounds. *Numeric, 7 positions with 3-place decimal; optional.*
Cubic	The total cubic volume of the location. The cubic volume can be expressed in any measurement you wish (e.g., inches, feet, meters, etc.) as long as the same measurement is used throughout the system in the Height, Length, Width, and *cubic* fields. The system calculates the cubic capacity if values are entered in the height, length, and weight fields. **Note:** The value in the Fill factor field works in conjunction with this field. *Numeric, 7 positions; optional.*
Max SKUs	The maximum number of SKUs that should be stored in this location. This is an informational field that does not restrict placement above this number. *Numeric, 1 position; optional.*
Dimensions	**Dimensions**

Field	Description
Height	The total height (the distance from the top to the bottom) of the location. The height can be expressed in any measurement you wish (e.g., inches, feet, meters, etc.) as long as the same measurement is used throughout the system in all Height, Length, Width, and Cubic fields. *Numeric, 3 positions; optional.*
Length	The total length (the distance from one side to the other) of the location. The length can be expressed in any measurement you wish (e.g., inches, feet, meters, etc.) as long as the same measurement is used throughout the system in all *height, length, weight,* and *cubic* fields. *Numeric, 3 positions; optional.*
Width	The total width (the distance from the front to the back) of the location. The width can be expressed in any measurement you wish (e.g., inches, feet, meters, etc.) as long as the same measurement is used throughout the system in the *height, length, weight,* and *cubic* fields. *Numeric, 3 positions; optional.*
Comment	A user-defined comment about the location. *Alphanumeric, 20 positions; optional.*

Work with Items in Location Screen

Purpose: Use this screen to delete an item or SKU location or to display item or SKU information. Essential user-defined and system-updated quantity information is kept at the item/SKU location level.

How to display this screen: Select Items for a location at the Work with Locations Screen.

Field	Description
Item	The code of the item assigned to this warehouse location. You can enter any portion of the code to search for the item. *Alphanumeric, 12 positions; optional.*
SKU	The code defining unique item characteristics such as its color, size and width. You can enter any portion of the code to search for the SKU. *Alphanumeric, 14 positions; optional.*
On hand quantity	The number of units for the item in this location. *Numeric, 7 positions; display-only.*
Printed quantity	The number of units currently “allocated” for the item in this location, determined by the total quantity of the item on printed pick slips. When determining the locations from which to reserve items during pick slip generation, the printed quantity is subtracted from the on-hand quantity in the location to determine the quantity available for reservation. *Numeric, 7 positions; display-only.*

Field	Description
Freeze (Reservation freeze flag)	Indicates whether the item location or SKU location is frozen. Valid values are: • Y = The item/SKU location is frozen. • N = The item/SKU location is not frozen. If a location is frozen, Pick Slip Generation does not print picks. See Performing Pick Slip Generation. **Note:** Even though a pick slip does not print for an item from a frozen item location, the system still reserves the item on the Order Lines Fields in Order Entry.
Pending	Identifies the quantity of the item to be affected by a pending batch inventory transaction or work order. • A negative pending quantity indicates the quantity is to be removed from the location. • A positive pending quantity indicates the quantity to be added to the location. *Numeric, 7 positions; display-only.*

Screen Option	Procedure
To delete an item location	Select Delete for an item location to delete it. You can not delete an item location if pick slips have been printed; a transfer is pending through a finished good, an interactive or a batch inventory transaction; or if there is an on-hand quantity other than zero. The system displays the following message: `Item location cannot be deleted; On-hand, Transfer, or Printed quantity is not equal to zero.`
To display item information	Select Display for an item or SKU location to display the base item information. You advance to the Display Item Screen.

Using the Location Generator (MLOC)

Purpose: Use Generate Locations to define multiple locations at the same time when your warehouse locations are comprised of zone, aisle, shelf, and bin elements. Warehouse locations are used to identify where merchandise is stored in the warehouse.

You use this function during initial system setup to define your locations. You can also use it when adding new locations.

> **Note:**
>
> You can use the Generate Locations function only if your warehouse locations are comprised of zone, aisle, shelf, and bin elements and the aisle, shelf and bin elements are numeric. Otherwise, use Creating and Maintaining Locations (WLOC) to define your locations. You can also use Creating and Maintaining Locations (WLOC) to create, change, delete, or display individual location records, regardless of how your locations are defined.

Example: Creating location records for Zones A and B, Aisles 1 and 2, Shelf 1, and Bins 1 and 2, generates eight location records:

A 01 01 01

A 01 01 02

A 02 01 01

A 02 01 02

B 01 01 01

B 01 01 02

B 02 01 01

B 02 01 02

Each record will be created with the same attributes. You can change or delete individual records with the Work with Pending Locations Screen (WPLO) before the records are added to the Location table, or with Creating and Maintaining Locations (WLOC) if the Location table has been updated.

For more information: See Work with Pending Locations Screen (WPLO).

Location Generator Screen

How to display this screen: Enter MLOC in the *Fast path* field at the top of any menu or select Location Generator from a menu.

Field	Description
Warehouse	The warehouse code where the locations are being defined. The warehouse code defaults from the Default Warehouse (A04) control value in the Warehouse/Reservation Values section of the System Control table and can be overridden. The warehouse code is validated against the Warehouse table. *Numeric, 3 positions; required.*
Defer creation	A flag indicating whether the records will be added to the Location table immediately, or whether they will be written to a work table so you can change or delete individual records before the Location table is updated. • Selected = indicates that the requested location records will be written to a work table. Individual records can be changed or deleted before the Location table is updated. • Unselected = indicates that the requested location records will be added to the Location table immediately.

Field	Description
Zones	Enter the codes of the zones for the locations being defined. Location records for up to 10 warehouse zones can be created at one time. *Alphanumeric, 2 positions; required.*
From aisle	Enter the number of the first aisle in the location range you are creating. *Numeric, 2 positions; required.*
To aisle	Enter the number of the last aisle in the location range you are creating. *Numeric, 2 positions; required.*
From Shelf	Enter the number of the first shelf in the location range you are creating. *Numeric, 2 positions; required.*
To shelf	Enter the number of the last shelf in the location range you are creating. *Numeric, 2 positions; required.*
From bin #	Enter the number of the first bin in the location range you are creating. *Numeric, 2 positions; required.*
To bin #	Enter the number of the last bin in the location range you are creating. *Numeric, 2 positions; required.*

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Loc type (Location type)</td><td>The location type, which determines whether the location is permanent or temporary, and whether merchandise will be replenished to or from the location.

P = Primary location = The primary, or main locations from which items are picked. An item can be stored in more than one primary location.
S = Secondary location = Secondary locations are generally used for storage when the primary location is full.

If a secondary location is pickable, the system will allocate from it when the total order quantity cannot be filled (completely) from a primary location. The system will allocate from both the primary and secondary locations when neither location contains enough stock to fulfill the entire order.

Secondary locations can be used to replenish primary locations.
B = Bulk location = Bulk locations are additional storage locations that are generally used to store case lots or cartons that are not broken up at receiving.

If a bulk location is pickable, the system will allocate from it when the total order quantity cannot be filled (completely) from either a primary or secondary location. The system will allocate from primary, secondary and bulk locations when none of the locations contain enough stock to fulfill the entire order.

Bulk locations can be used to replenish primary locations.
T = Temporary location = Temporary locations are used to place merchandise that you want recognized as received, before a permanent location is assigned. A temporary location cannot exist without at least one item/location record associated with it. When stock is moved into a temporary location, the system creates an item/location record. When the on-hand in the item/location reaches zero, the system will delete the location and the item/location record.

Note:

Order Administration will not allocate merchandise from a temporary location even if the location is defined as pickable. In order to allocate stock, you must move the merchandise to a non-temporary, pickable location.

Alphanumeric, 1 position; required.</td></tr>
<tr><td>Weight cap (Weight capacity)</td><td>The total weight the location can hold, expressed in whole pounds.
Numeric, 7 positions with 3-place decimal; optional.</td></tr>
<tr><td>Unit cap (Unit capacity)</td><td>The total number of units that can fit in the location.
Numeric, 7 positions; optional.</td></tr>
</table>

Field	Description
Fill factor	A user-defined percentage value that is used during Suggest Location Placement (MSLO) to determine when the location is stocked to capacity. The system evaluates the location capacity entered in the *cubic* field against the Fill factor to determine the location's true item capacity. A location may be considered filled to capacity when 80% of its cubic volume is consumed because of the shape of the items that are stored in it. The cubic volume of a location may be 100 cubic feet, but may hold only eight items that are 10 cubic feet each because the items are spherical in shape. The system assumes the fill factor is 100% if this field is left blank. *Alphanumeric, 5 positions with a 2-place decimal; optional.*
Height	The total height (the distance from the top to the bottom) of the location. The height can be expressed in any measurement you wish (e.g., inches, feet, meters, etc.) as long as the same measurement is used throughout the system in the *height, length, weight,* and *cubic* fields. *Numeric, 3 positions; optional.*
Length	The total length (the distance from one side to the other) of the location. The length can be expressed in any measurement you wish (e.g., inches, feet, meters, etc.) as long as the same measurement is used throughout the system in the *height, length, weight,* and *cubic* fields. *Numeric, 3 positions; optional.*
Width	The total width (the distance from the front to the back) of the location. The width can be expressed in any measurement you wish (e.g., inches, feet, meters, etc.) as long as the same measurement is used throughout the system in the *height, length, weight,* and *cubic* fields. Numeric, 3 positions; optional.

> **Note:**
>
> The cubic volume of the location will be calculated if values are entered in the *height, length,* and *width* fields.

Field	Description
Pickable	A code indicating whether inventory can be picked from the location. • Selected - indicates that inventory can be picked from the location. • Unselected - indicates that inventory cannot be picked from the location. Bulk locations, or locations where defective merchandise is kept are examples of non-pickable locations. **Note:** Inventory Inquiry in Order Entry includes quantities in pickable locations only; all other inventory inquiries display pickable and non-pickable quantities.
Hang/Flat	A code indicating how inventory is stored in the location. This field is informational only. • H = indicates that inventory in the location is hung. • F = indicates that inventory in the location is laid flat, or is stored in a conventional manner. • O = indicates that inventory in stored in the location in some other manner. *Alphanumeric, 1 position; required.*
Class (Location Class)	A user-defined code that identifies the type of merchandise that will be placed in this location. This code is used to restrict the placement of certain item types to specific locations. For example, if the location is defined as a 'Jewelry' location, only items that contain the item type code for 'Jewelry' can be placed in the location. The class code entered is validated against the Location Class table; see Creating and Maintaining Location Classes (WLCL). **Note:** If this field is left blank, only items that have a blank location class can be stored in the location. *Alphanumeric, 2 positions; optional.*
Freeze	Indicates whether the location and its merchandise are frozen. Valid values are: • Selected = The location is frozen. • Unselected = The location not frozen. If a location is frozen: • Pick Slip Generation ignores the location when determining where inventory should be picked to fulfill an order. See Performing Pick Slip Generation. • Suggest Location Placement (MSLO) ignores the location when suggesting where to place stock.

Field	Description
Stock type	A user-defined code that describes the type of merchandise that can be found in the location. Examples include DEF (Defective), or RTV (Return to Vendor). This field is informational only. *Alphanumeric, 3 positions; optional.*
Freq code (Frequency Code)	A user-defined code that represents the frequency with which inventory is picked from the location. Informational only. *Alphanumeric, 1 position; optional.*
Comment	A user-defined comment about the location. *Alphanumeric, 20 positions; optional.*

Completing this screen: The Location Generator Screen opens, retaining your original entries, if you did not select to defer creation of the location records. You can create additional locations or return to a menu. The Work with Pending Locations Screen (WPLO) opens if you entered Y to defer creation.

Work with Pending Locations Screen (WPLO)

Purpose: Use this screen to change, delete, or display information about the warehouse locations you are creating during this session.

How to display this screen: Complete the Location Generator Screen and choose to defer the creation of location records. Only the location records created during the current Generate Locations session are listed.

You can also display this screen by selecting Work with Pending Locations (*Fast path* = WPLO) from a menu if you have previously used the Location Generator Screen and then exited the Work with Pending Locations screen without accepting or rejecting the pending locations.

Pending warehouse locations are locations that were created by the Location Generator in a deferred status. These records are created in a deferred status when you want to review and modify location information before updating the permanent Location Table.

Field descriptions: See the Change Pending Locations Screen for descriptions of the fields on this screen.

Screen Option	Procedure
Accept pending location information	Select Accept to add the pending location records to the Location Table. All pending location records created during the current session will be added.
Reject pending location information	Select Reject to delete all pending location records created during the current session.
Change pending location information	Select Change for a pending location to advance to the Change Pending Locations Screen.
Delete pending location information	Select Delete for a pending location to delete it.

Screen Option	Procedure
Display pending location information	Select Display for a pending location to advance to the Display Pending Locations Screen. You cannot change any information at this screen. See the Change Pending Locations Screen for field descriptions.

Change Pending Locations Screen

To change: Select Change for a pending location at the Work with Pending Locations Screen (WPLO) to advance to the Change Pending Locations Screen. At this screen you can change any information except the warehouse code and location code.

Field	Description
Warehouse	The warehouse code where the location is located. *Numeric, 3 positions; display-only.*
Location	The code identifying the pending location, comprised by concatenating the zone, aisle, shelf, and bin, as specified at the Location Generator Screen. *Alphanumeric, 7 positions; display-only.*
Zne (Zone)	The Zone from the Location Generator Screen defaults. *Alphanumeric, 1 position; optional.*
Aisle	The Aisle from the Location Generator Screen defaults. *Numeric, 2 positions; optional.*
Shlf (Shelf)	The Shelf from the Location Generator Screen defaults. *Numeric, 2 positions; optional.*
Bin	The Bin from the Location Generator Screen defaults. *Numeric, 2 positions; optional.*
Pickable	A code indicating whether inventory can be picked from the location. • Selected - indicates that inventory can be picked from the location. • Unselected - indicates that inventory cannot be picked from the location. Bulk locations, or locations where defective merchandise is kept are examples of non-pickable locations. **Note:** Inventory Inquiry in Order Entry includes quantities in pickable locations only; all other inventory inquiries display pickable and non-pickable quantities.

Field	Description
Freeze	Indicates whether the location and its merchandise are frozen. Valid values are: • Selected = The location is frozen. • Unselected = The location not frozen. If a location is frozen: • Pick Slip Generation ignores the location when determining where inventory should be picked to fulfill an order. See Performing Pick Slip Generation. • Suggest Location Placement (MSLO) ignores the location when suggesting where to place stock.
Hang/Flat	A code indicating how inventory is stored in the location. This field is informational only. • Hanging = indicates that inventory in the location is hung. • Flat = indicates that inventory in the location is laid flat, or is stored in a conventional manner. • Other = indicates that inventory in stored in the location in some other manner. *Required.*

Field	Description
Location type	The location type, which determines whether the location is permanent or temporary, and whether merchandise will be replenished to or from the location. • Primary = The primary, or main locations from which items are picked. An item can be stored in more than one primary location. • Secondary = Secondary locations are generally used for storage when the primary location is full. If a secondary location is pickable, the system will allocate from it when the total order quantity cannot be filled (completely) from a primary location. The system will allocate from both the primary and secondary locations when neither location contains enough stock to fulfill the entire order. Secondary locations can be used to replenish primary locations. • Bulk = Bulk locations are additional storage locations that are generally used to store case lots or cartons that are not broken up at receiving. If a bulk location is pickable, the system will allocate from it when the total order quantity cannot be filled (completely) from either a primary or secondary location. The system will allocate from primary, secondary and bulk locations when none of the locations contain enough stock to fulfill the entire order. Bulk locations can be used to replenish primary locations. • Temporary = Temporary locations are used to place merchandise that you want recognized as received, before a permanent location is assigned. A temporary location cannot exist without at least one item/location record associated with it. When stock is moved into a temporary location, the system creates an item/location record. When the on-hand in the item/location reaches zero, the system will delete the location and the item/location record. **Note:** Order Administration will not allocate merchandise from a temporary location even if the location is defined as pickable. In order to allocate stock, you must move the merchandise to a non-temporary, pickable location. *Required.*
Stock type	A user-defined code that describes the type of merchandise that can be found in the location. Examples include DEF (Defective), or RTV (Return to Vendor). This field is informational only. *Alphanumeric, 3 positions; optional.*
Capacity	**Capacity**

Field	Description
Weight	The total weight the location can hold, expressed in whole pounds. *Numeric, 7 positions with 3-place decimal; optional.*
Cubic	The total cubic volume of the location. The cubic volume can be expressed in any measurement you wish (e.g., inches, feet, meters, etc.) as long as the same measurement is used throughout the system in the *height, width,* and *cubic* fields. The system calculates the cubic capacity if values are entered in the *height, length,* and *weight* fields. **Note:** The value in the *Fill factor* field works in conjunction with this field. *Numeric, 7 positions; optional.*
Dimensions	**Dimensions**
Height	The total height (the distance from the top to the bottom) of the location. The height can be expressed in any measurement you wish (e.g., inches, feet, meters, etc.) as long as the same measurement is used throughout the system in the *height, length, weight,* and *cubic* fields. *Numeric, 3 positions; optional.*
Length	The total length (the distance from one side to the other) of the location. The length can be expressed in any measurement you wish (e.g., inches, feet, meters, etc.) as long as the same measurement is used throughout the system in the *height, length, weight,* and *cubic* fields. *Numeric, 3 positions; optional.*
Width	The total width (the distance from the front to the back) of the location. The width can be expressed in any measurement you wish (e.g., inches, feet, meters, etc.) as long as the same measurement is used throughout the system in the *height, length, weight,* and *cubic* fields. *Numeric, 3 positions; optional.* **Note:** The cubic volume of the location will be calculated if values are entered in the *height, length,* and *width* fields.
Comment	A user-defined comment about the location. *Alphanumeric, 20 positions; optional.*

Creating Item Warehouse/Locations (MIWL)

Purpose: Use Create Item Warehouse/Locations to create or change an item's primary primary location in the item's primary warehouse. Item warehouse records identify the items that are stored in the warehouse. Item location records identify the items that are stored in each location.

This menu option provides a quick method of assigning an item to a primary primary location in the item's primary warehouse, or changing information about an existing primary primary location in the warehouse.

You can use this menu option to do the following:

- Create a new primary primary location for an item/SKU. See Creating a New Primary Primary Location.
- Update the location minimum quantity and location maximum quantity for the existing primary primary location for an item/SKU. See Updating the Primary Primary Min/Max Quantities.
- Remove the primary primary location for an item/SKU. See Removing the Primary Primary Location.
- Define the following information for the item:
  - shipping weight
  - selling weight
  - item cube value
  - pieces per case (case quantity)
  - UPC code

See Updating Item Information.

First Create Item Warehouse/Locations Screen

How to display this screen: Enter MIWL in the *Fast path* at the top of any menu, or select Create Item Warehouse/Locations from a menu.

Field	Description
Warehouse	The warehouse code where the item location information is being changed. This must be the Primary warehouse for an item or SKU, in order to display location information for the item through this menu option. Warehouse codes are defined in and validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS). *Numeric, 3 positions; required.*
Item	The item number for which you are changing primary primary item location information. Item numbers are defined in and validated against the Item table; see Performing Initial Item Entry (MITM). The warehouse entered must be the item's primary warehouse. If it is not, the following message appears: `No data to display`. *Alphanumeric, 12 positions; required.*

Completing this screen:

1. Enter a valid warehouse code that represents the primary warehouse assigned to an item.
2. Optionally, enter an item code to position your results to a specific item.
3. Select OK.
4. The system displays the Second Create Item/Warehouse Locations Screen. This screen displays items/SKUs whose primary warehouse matches your entry. Primary primary location information, if available, is indicated for each item/SKU. The location information is blank if a primary primary location is not defined for the item/SKU.

Second Create Item/Warehouse Locations Screen

How to display this screen: Complete the First Create Item Warehouse/Locations Screen and select OK.

Field	Description
Item	A code for the item that is located in a primary location in the specified primary warehouse. *Alphanumeric, 12 positions; display-only.*
SKU	A code for the SKU of the item that is located in a primary location in the specified primary warehouse. *Alphanumeric, three 4-position fields; display-only.*
The following fields are enterable:	NA
Weight	The actual shipping weight of the item. The system can use this value to calculate carton weights and determine shipping charges. The system defaults the shipping weight defined for the SKU; if a shipping weight is not defined for the SKU, the system defaults the shipping weight defined for the item. However, you can override it. If the item contains SKUs, updates *Weight override* in the SKU table; if the item does not contain SKUs, updates *Ship weight* in the Item table. *Numeric, 7 positions with a 3-place decimal, optional.*
Cube	The cubing value of the item. This field is used in Pick Slip Generation to determine the number of units that can fit in a carton. To change the cubic value of the item, type over the existing value. The system defaults the cubing value defined for the SKU; if a cubing value is not defined for the SKU, the system defaults the cubing value defined for the item. However, you can override it. If the item contains SKUs, updates *SKU Cubing value override* in the SKU table; if the item does not contain SKUs, updates *ITM Cubing value* in the Item table. *Numeric, 7 positions with a 1-place decimal; optional.*

Field	Description
Location	The item's primary primary location. The system defaults the Primary location in the SKU table; however you can override it to create a new primary location. Remove the location defined in this field if you wish to remove the primary primary location defined for the item/SKU; see Removing the Primary Primary Location. Updates *Location* in the SKU table. Locations are defined in and validated against the Location table. See Creating and Maintaining Locations (WLOC). *Alphanumeric, 7 positions; required if a Min Qty or Max Qty is defined.*
Min Qty	The minimum quantity of the item that should be on hand in the location. The system defaults the location minimum from the SKU table; however, you can override it. Updates *Min qty* in the Item Location table and *Min qty for location* in the SKU table. *Numeric, 7 positions; optional.*
Max Qty	The maximum quantity of the item that should be on hand in the location. The system defaults the location maximum from the SKU table; however, you can override it. Updates *Max qty* in the Item Location table and *Max qty for location* in the SKU table. *Numeric, 7 positions; optional.*
Sell Wgt	The actual selling weight of the item. The system uses this value to calculate the freight charge on an item when the freight method on the order is set to By Item or Flat Rt/Item. The system defaults the selling weight defined for the SKU; if a selling weight is not defined for the SKU, the system defaults the selling weight defined for the item. However, you can override it. If the item contains SKUs, updates *Selling weight override* in the SKU table; if the item does not contain SKUs, updates *Selling weight* in the Item table. *Numeric, 7 positions with a 3-place decimal; optional.*
Case Qty	The number of units that fit in a case. The system defaults the pieces per case quantity defined for the item; however, you can override it. Updates *Pieces per case* in the Item table. **Multiple case quantities for the same item/SKU?** If you define a different case quantity for the same item/SKU for more than one item location record on this screen, the system updates the item/SKU with the case quantity that the system processes last (the lowest record that displays for the item/SKU on the screen). *Numeric, 5 positions; optional.*

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>UPC</td><td>The UPC code defined for the item/SKU.
The first UPC code defined for the item/SKU defaults; however, you can override it to create a new UPC for the item/SKU.
A message similar to the following indicates if the UPC code has already been assigned to an item: <code>UPC already assigned to XXXXXX</code>.

Note:
Include any leading zeros. For example: if the UPC code is 06012011, enter <code>06012011</code> and not <code>6012011</code>.

Creates a record in the Item UPC table.
Alphanumeric, 14 positions; required to create a UPC code.</td></tr>
<tr><td>UPC Type</td><td>If you enter a UPC code for an item location record, the system uses this UPC type to create the UPC code in the Item UPC table.
The UPC type for the first UPC code defined for the item/SKU defaults; however, you can override it to create a new UPC for the item/SKU.
Valid UPC types are:
• E13 = EAN-13, indicating a 13 position UPC code; however, Order Administration does not validate the UPC length.
• E8 = EAN-8, indicating an 8 position UPC code; however, Order Administration does not validate the UPC length.
• UA = UPC-A, indicating a 12 position UPC code; however, Order Administration does not validate the UPC length.
• UE = UPC-E, indicating a 6 position UPC code; however, Order Administration does not validate the UPC length.
Alphanumeric, 3 positions; required to create a UPC code.</td></tr>
<tr><td>UPC Vendor</td><td>If you enter a UPC vendor for an item location record, the system uses this UPC vendor to create the UPC code in the Item UPC table.
The UPC vendor for the first UPC code defined for the item/SKU defaults.
• You can override the default UPC values to create a new UPC for the item/SKU.
• You can enter a new UPC vendor to change it for the default UPC code.
Numeric, 7 positions; required to create a UPC code.</td></tr>
</table>

Updating Item Information

To update...	do the following...
the item's cube value	enter the item's cube value in the Cube field. The item's current cube value defaults, but you can override it.
the item's shipping and selling weights	enter the item's shipping and selling weights in the Weight and Sell Wgt fields. The item's current shipping and selling weights default, but you can override them.
the item's pieces per case quantity	enter the item's pieces per case quantity in the Case Qty field. The item's current pieces per case quantity defaults, but you can override it.
the item's UPC code	**To update the vendor for the existing UPC code:** 1. The UPC, UPC Type, and UPC Vendor for the first UPC code defined for the item/SKU defaults; to update this existing UPC code, retain the current value in the UPC and UPC Type fields. 2. Enter a new UPC vendor in the UPC Vendor field. **To create a new UPC for the item/SKU:** 1. Enter a UPC code for the item in the UPC field. The first UPC code defined for the item/SKU defaults; however, you can override it to create a new UPC for the item/SKU. **Note:** Include any leading zeros. For example: if the UPC code is 06012011, enter `06012011` and not `6012011`. 2. Enter a UPC type in the UPC Type field. The UPC type for the first UPC code defined for the item/SKU defaults; however, you can override it to create a new UPC for the item/SKU. 3. Enter a UPC vendor in the UPC Vendor field. The UPC vendor for the first UPC code defined for the item/SKU defaults; however, you can override it to create a new UPC for the item/SKU.

Once you have defined the item information you wish to update, click OK. The system validates your entries and performs the update.

You can review the updated item information on the following screens:

- non-SKUed item: Change Item screen to review the updated *Cube, Shipping weight, Selling weight* and *Pieces per case*. See Create Item Screen for more information.
- SKUed item: Change Item screen to review the updated *Pieces per case*; Change SKU - 2 of 2 (With Overrides) screen to review the updated *Cube, Shipping weight*, and *Selling weight*. See Create Item Screen and Create SKU 2 of 2 (With Overrides) Screen.
- Work with UPC Codes Screen to review the created or updated UPC code.

Updating the Primary Primary Min/Max Quantities

Use the following steps to update the minimum and/or maximum quantities for the item's primary primary location that is already assigned to the item.

To update...	do the following...
the minimum item location quantity	enter the minimum quantity in the Min Qty field. The item location's current minimum quantity defaults, but you can override it.
the maximum item location quantity	enter the maximum quantity in the Max Qty field. The item location's current maximum quantity defaults, but you can override it.

Once you have defined the item location information you wish to update, click OK. The system validates your entries and performs the update.

The system updates the *Min qty* for location and *Max qty* for location fields in the SKU table to the new minimum and maximum quantities you defined. The new minimum and maximum quantities display on the Change Item (Base Information screen for a non-SKUed item and on the Change SKU 1 of 2 (With Overrides) screen for a SKUed item. See Create Item (Base Information) Screen and Create SKU 1 of 2 (With Overrides) Screen for more information.

Creating a New Primary Primary Location

Use the following steps to update an item/SKU's primary primary location to the primary location you enter.

1. In the Location field, enter the location code you wish to use as the item/SKU's new primary primary location. A valid item location code must be entered. The primary primary location currently defined for the item/SKU, if any, defaults, but you can override it to assign the item to a new primary primary location.
2. Optionally, enter the minimum and maximum amounts for the item in this location in the Min Qty and Max Qty fields. The minimum and maximum quantities for the item's current primary primary location defaults, but you can type over the existing information if the minimum and maximum quantities for the new primary location differ. The existing location information will not be affected. Leave these fields 'as is' if the minimum and maximum amounts for the previous primary location and the new primary location are the same. These fields can be left blank if the minimum and maximum quantities for the item location are unknown.
3. Click OK. The system validates your entries and advances you to the Confirm Location Change window. Click OK to perform the update; otherwise, click Exit to cancel.

The system updates the *Location* field in the SKU table to the new primary location you defined. The new primary primary location displays on the Create Item (Base Information) Screen (non-SKUed item) or Create SKU 1 of 2 (With Overrides) Screen (SKUed item).

> **Note:**
>
> The system retains the item location record for the old primary primary location in the Item Location table.

Removing the Primary Primary Location

Use the following steps to delete the primary primary location defined for the item/SKU. You can delete the primary primary location for an item/SKU only if the item location does not have an On hand quantity, Pending transaction quantity, or Printed quantity in the Item Location table.

1. Remove the location defined in the Location field.
2. Remove the minimum quantity and maximum quantity defined in the Min Qty and Max Qty fields.
3. Click OK. The system advances you to the Confirm Location Change window. Notice that the *To location* is blank, indicating that you wish to remove the item/SKU from its current primary primary location and not define a new primary primary location for the item/SKU.
4. Click OK.
   - If the item location has an On hand quantity, Pending transaction quantity, or Printed quantity in the Item Location table, the system displays an error message and does not delete the primary primary location defined for the item/SKU: `Item location cannot be deleted; on-hand/transfer/printed qty > 0.`
   - If the item location does not have an On hand quantity, Pending transaction quantity, or Printed quantity in the Item Location table, the system:
   -
     – deletes the record from the Item Location table.
     – removes the location from the *Location* field in the SKU table. The primary primary location for the item/SKU is now blank on the Create Item (Base Information) Screen (non-SKUed item) or Create SKU 1 of 2 (With Overrides) Screen (SKUed item).

> **Note:**
>
> The system deletes the primary primary location only; the system retains any other primary locations defined for the item/SKU in the Item Location table.

Suggest Location Placement (MSLO)

Purpose: Use the Suggest Location for Item function when you want the system to search for available warehouse space to determine where you should place an item.

There are two different methods available for suggesting item locations:

Standard Suggest Location Placement: The system searches through the available warehouse locations and suggests where you might place the stock. You use the System Control table to specify the criteria the system uses to select locations and the order in which to search different location types.

This function is for inquiry only, and does not allow you to actually place the stock in the suggested locations. To place the stock, use

- Performing Inventory Transactions;
- Receiving Purchase Orders (PORC); or
- Placing Suspended Stock (SUSP).

The same logic is used in purchase order receiving. See Suggest Warehouse/Location Placement.

In this topic:

- Suggest Location For Item Screen
- Work with Suggested Locations Screen

Suggest Location For Item Screen

Purpose: Use this screen to enter the item and warehouse information for system-suggested placement. You enter the item/SKU, warehouse code, and quantity to place.

How to display this screen: Enter MSLO in the *Fast Path* field at the top of any menu, or select Suggest Location for Item from a menu.

Field	Description
Item	The code of the item you are placing in the warehouse. Item codes are defined in and validated against the Item table. *Alphanumeric, 12 positions; required.*
SKU fields	The item's unique characteristics, such as its color and size. *Alphanumeric, three 4-position fields; required if the item has SKUs.*
Warehouse	The code of the warehouse where the item is being placed. Warehouse code are defined in and validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS). Even if you use a staging warehouse, you should enter the code of the main warehouse where the stock should eventually be placed. *Numeric, 3 positions; required.*
Qty (Quantity)	The number of units of the item to be placed. *Numeric, 7 positions; required.*

Completing this screen: The system will determine the locations where the item should be placed using the criteria defined by your company in the System Control table. The following message indicates:

```
Suggesting locations...please wait
```

You advance to the Work with Suggested Locations Screen.

Work with Suggested Locations Screen

Purpose: This screen displays the suggested warehouse locations for the item.

How to display this screen: Select OK at the Suggest Location For Item Screen.

Field	Description
Item	The item code and SKU, if any, for which the system is suggesting locations for placement. *Item: Alphanumeric, 12 positions.* *SKU: Alphanumeric, three 4-position fields.*
Qty requested (Quantity requested)	The number of units of the item to place. *Numeric, 7 positions.*

Field	Description
Whs (Warehouse)	The warehouse where the system is placing the merchandise. If you use a staging warehouse, the system will always suggest this warehouse for placement. *Numeric, 3 positions.*
Location	The location where the associated quantity should be placed. *Alphanumeric, 7 positions.*
Quantity placed	The quantity to place in the location. *Numeric, 7 positions.*

Working with Default Warehouse Locations (WWDL)

Purpose: Use the Default Warehouse Locations function to define locations for the system to select automatically for certain transfers, receipts, or suggesting inventory placement.

You define default warehouse locations by type. Valid location types are:

- Bulk
- Backorder
- In Transit
- Non-Alloc Whs Receiving
- Outlet Transfer
- OTS Unallocated Location
- Pending Putaway
- Primary
- Return

In this topic:

- Defining Default Warehouse Locations for a Staging Warehouse
- Defining Default Warehouse Locations for a Pending Putaway Warehouse
- Work with Warehouse Default Locations Screen
- Create Warehouse Default Location Screen

Defining Default Warehouse Locations for a Staging Warehouse

If you use a staging warehouse location within Order Management System as part of your receiving putaway process, you must define several default location types for the staging warehouse. A staging warehouse is a warehouse code that designates an area within your actual warehouse where you keep stock that needs to be put away.

When you receive a purchase order, you can have the system suggest placement in default locations within the staging warehouse. Each staging warehouse default location refers to actual location(s) within your warehouse; for example, a default bulk location in the staging warehouse refers to a bulk storage area in your actual warehouse. You receive the stock into the bulk location in the staging warehouse; at this point, the inventory is not included in your on-hand quantity in your main warehouse. When you move the stock from the staging area to the actual bulk location, you process the inventory transaction to reflect the stock's location and update inventory levels in your main warehouse.

The default location types to assign in your staging warehouse are:

- Bulk
- Backorder
- In Transit
- Primary
- Return
- Non-Alloc Whs Receiving

The default location type to assign to your main warehouse is Intransit.

You may also wish to define a Pending Putaway default; see below.

Defining Default Warehouse Locations for a Pending Putaway Warehouse

A pending putaway warehouse is a warehouse where you keep stock that still needs to be moved to its final destination; for example, a staging area.

You can define a warehouse as a *pending putaway* warehouse by assigning a warehouse location type of PP Pending Putaway Warehouse to the warehouse. Use a *pending putaway* warehouse to temporarily store saleable inventory on its way to its final destination warehouse. Inventory received into a *pending putaway* warehouse retains its on order status so that the inventory is visible in PO Layering, yet the system recognizes the inventory as being in a warehouse location so that you can manipulate it.

See Pending Putaway Overview for more information on the updates the system performs when you receive inventory into a pending warehouse.

Work with Warehouse Default Locations Screen

How to display this screen: Enter WWDL in the *Fast path* field at the top of any menu or select Work with Default Warehouse Location from a menu.

Field	Description
Whs Warehouse	The actual or virtual warehouse where the default location is located. Warehouse codes are defined in and validated against the Warehouse table. *Numeric, 3 positions; optional.*
Type	The type of default location. Valid values are: • **Bulk** • **Back Order** • **In Transit** • Non-Alloc Whs Receiving • **Outlet transfer** • **OTS Unallocated Location** • **Pending Putaway** • **Primary** • **Return** *Optional.*
Max # items	This field is not currently implemented. *Numeric, 5 positions; optional.*

Field	Description
Alt seq Alternate sequence number	This field is not currently implemented. *Numeric, 3 positions; optional.*
Qty suggest Quantity suggested	This field is not currently implemented. *Numeric, 7 positions; optional.*
Max/bin Maximum quantity per bin	The maximum quantity for the system to suggest be placed in a bin. For example, you might restrict the amount of stock to place in a backorder location so that it does not become too crowded for efficient picking. *Numeric, 5 positions; optional.*
Location	The location within the warehouse to use as a default. The location code is a 7-position code typically comprised of: 1. Warehouse zone 2. Aisle 3. Aisle 4. Shelf 5. Shelf 6. Bin number 7. Bin number *Alphanumeric, 7 positions; optional.*

Screen Option	Procedure
Create a new default location	Select Create to advance to the Create Warehouse Default Location Screen.
Change a default location	Select Change for a default location to advance to the Change Warehouse Default Location Screen. You can change any information on this screen except for the warehouse and the type. See the Create Warehouse Default Location Screen for field descriptions.
Delete a default location	Select Delete for a default location to delete it.
Display a default location	Select Display for a default location to advance to the Display Warehouse Default Locations Screen. You cannot change any information at this screen. See the Create Warehouse Default Location Screen for field descriptions.

Create Warehouse Default Location Screen

Purpose: Use this screen to define a location for the system to check automatically when processing certain transactions.

How to display this screen: Select Create at the Work with Warehouse Default Locations Screen.

Field	Description
Warehouse	The actual or virtual warehouse where the default location is located. Warehouse codes are defined in and validated against the Warehouse table; see Creating and Maintaining Warehouses (WWHS). *Numeric, 3 positions.* *Create screen: required.* *Change screen: display-only.*
Location type	The type of default location. Valid values are: • **Bulk** • **Back Order** • **In Transit** • Non-Alloc Whs Receiving: If you select location type Non-Alloc Whs Receiving, the warehouse you enter must be flagged as non-allocatable. • **Outlet transfer** • **OTS Unallocated Location** • **Pending Putaway** • **Primary** • **Return** *Create screen: required.* *Change screen: display-only.*
Max# of items	This field is not currently implemented. *Numeric, 5 positions; optional.*
Alternate seq# Alternate sequence number	This field is not currently implemented. *Numeric, 3 positions; optional.*
Qty suggested	This field is not currently implemented. *Numeric, 7 positions; optional.*
Max qty per bin	The maximum quantity for the system to suggest be placed in a bin. For example, you might restrict the amount of stock to place in a backorder location so that it does not become too crowded for efficient picking. *Numeric, 5 positions; optional.*

Field	Description
Location	The location within the warehouse to use as a default. The location code is a 7-position code typically comprised of: 1. Warehouse zone 2. Aisle 3. Aisle 4. Shelf 5. Shelf 6. Bin number 7. Bin number Your entry must be a valid location for the warehouse in the Warehouse field. *Alphanumeric, 7 positions; optional.*

Printing the On Hand by Warehouse Report (POHW)

Purpose: Review total on-hand quantities for items in one or more allocatable warehouses.

Only items with on-hand quantities appear on the reports. If the on-hand quantity for an item in a warehouse is zero, it does not appear on the report.

What else is on the On Hand by Warehouse report? Depending on your selections at the On Hand by Warehouse List Prompt Screen, this report can also include for each item/SKU within the warehouse:

- unit and total cost
- total retail price and extended price, based on the price for the item or SKU in the offer specified in the Current Offer (A33) system control value
- unit and total vendor item price

What else is on the On Hand by Vendor by Warehouse report? In addition to the same information as the On Hand by Warehouse report, this report includes the total quantity returned, sold, adjusted, and received month to date.

How do you produce the On Hand by Vendor by Warehouse report? The system produces the On Hand by Vendor by Warehouse report only if your selections at the On Hand by Warehouse List Prompt screen include:

- Vendor is blank
- By warehouse/by warehouse vendor is set to Whse vendor

Otherwise, the system produces the On Hand by Warehouse report, which does not include the returned, sold, adjusted, or received quantities for the month to date.

> **Note:**
>
> The totals on these reports may not match the totals on other inventory or costing reports due to differences in calculation. For example, the decrease in total retail price on the On Hand by Warehouse report might not match the total value of sales on a sales report due to different methods of determining item or SKU prices.

In this topic:

- On Hand by Warehouse List Prompt Screen
- On Hand by Warehouse Report
- On Hand by Vendor by Warehouse Report

On Hand by Warehouse List Prompt Screen

How to display this screen: Enter POHW in the *Fast path* field at the top of any menu, or select Print On Hand by Warehouse from a menu.

Field	Description
Warehouse	The warehouse to include on the report. Leave this field blank to include all warehouses with inventory on hand. *Numeric, 3 positions; optional.*
Vendor	The vendor whose items to include on the report. Leave this field blank to include all vendors from whom you purchase inventory. The report includes items based on the primary Vendor identified in the Item table, although it is possible that you received some or all of the on-hand quantity from a different vendor. **Note:** • If the *By warehouse/by warehouse vendor* field is set to Whse: You cannot specify a vendor. • If the *By warehouse/by warehouse vendor* field is set to Whse vendor: If you specify a vendor, the system produces the On Hand by Warehouse report rather than the On Hand by Warehouse by Vendor report. *Numeric, 7 positions; optional.*

Field	Description
Print cost	Indicates which dollar value to include on the report. Valid values are: Cost: Include the standard, average, or FIFO cost on the report, based on the Costing Method (A25) system control value. If you use FIFO costing, the report does not include the unit cost of each item/SKU, only the extended cost. Retail: Include the most current price for the item/SKU, based on the latest Effective date that is not in the future. Also, the Current Offer (A33) must still be active, based on the End (End date) for the offer. If the item has SKUs, the report includes a price only if there is a SKU Price record; if the item does not have SKUs, the report selects the price from the Item Price record. Vendor list: Include the vendor/item price for the item's primary vendor. The report does not include a vendor/item price if there is no primary vendor, or if there is no vendor/item for the primary vendor. blank: Do not include any cost or price information on the report. *Optional.*
By warehouse/by warehouse vendor	Indicates whether the report should have a separate page for each vendor/warehouse combination. Valid values are: Whse: Generate the On Hand by Warehouse Report, which summarizes the on-hand quantity and dollar value (cost, price, or vendor/item price) for item/SKUs by warehouse. This report does not include the returned, sold, adjusted, or received quantities month-to-date. **Note:** If you select this value, you cannot specify a Vendor. Whse vendor: If no vendor is specified, generate the On Hand by Vendor by Warehouse Report, which summarizes the on-hand quantity and dollar value (cost, price, or vendor/item price) for items, broken out for each selected vendor/warehouse combination. This report also includes the quantities returned, issued, adjusted, and received month-to-date. Otherwise, generate the On Hand by Warehouse report. *Required.*

Completing this screen: Complete each required and any optional fields as described above. Select Submit to generate the report. If you selected Whse at the *By warehouse/by warehouse vendor* field, the system submits the job OHWLST if you selected Whse vendor, the system submits the job OHWVNDLST.

Docking Purchase Orders

Topics in this part: The following topics describe the functions available when using the Dock Purchase Orders function.

- Docking Purchase Orders (MDPO) shows you how to record a purchase order as “docked” before you receive it.
- Printing the Purchase Orders in Docked Status Report (PDPO) shows you how to print the Docked Purchase Order Report and describes the information on the report.
- Printing the Docked but Past Due Purchase Order Report (PDPD) shows you how to create and print the Past Due Docked Purchase Order Report and describes the information on the report.

Docking Purchase Orders (MDPO)

Purpose: You have the option of recording a purchase order as "docked" before you receive it. A docked status indicates that you have received inventory associated with the purchase order, but have not yet confirmed items or quantities. You can dock a purchase order just once, or many times for different deliveries. Until you actually receive the purchase order, inventory inquiries do not indicate that any of the associated inventory is on-hand in your warehouse.

A standard process would include:

- dock the purchase order
- count the merchandise and perform quality control
- receive the purchase order

Docking stock provides a record of when the inventory actually arrived at your warehouse, as opposed to when you completed quality control and recorded the receipt. This may be helpful if there is a question on whether the vendor delivered the merchandise on time.

If you dock stock, the system assigns a purchase order receipt control number at the time you dock it. In a multicompany situation, you can define a unique range of numbers in the Number Assignment table for each company. This will keep each company's data separate.

If you partially receive a docked purchase order, the purchase order status changes back to Open.

In this topic:

- Dock Purchase Orders Screen
- Primary Location Not Defined for PO

Dock Purchase Orders Screen

Use this screen to record a purchase order as "docked" before you receive it through PO Receiving.

How to display this screen: Enter MDPO in the *Fast path* field at the top of any menu or select this option from a menu.

Field	Description
Purchase order number	The number of the purchase order you are docking. You cannot dock a closed purchase order. The system validates that the purchase order number is associated with an open or docked PO. If the purchase order number you enter is not found in your current company, the system will search other companies until it finds a match. Active companies will search only other active companies and inactive companies will search only other inactive companies, based on the setting in the Company table. You must have the Cross company scan field selected in the Company table in order to use this function. *Numeric, 7 positions; required.*
Total number of cartons	The total number of cartons you are docking. *Numeric, 5 positions; required.*
Total weight	The total weight of all the cartons you are docking. *Numeric, 7 positions with a 2 place decimal; optional.*
Shipper tracking number	The tracking number assigned by the delivery company for this shipment. *Numeric, 20 positions; optional.*
Ship via	A code that represents a carrier who delivers merchandise from vendors to your company. Ship via codes are validated against the Purchase Order Ship Via table; see Working with Purchase Order Ship Via (WPSV). *Numeric, 2 positions; optional.*
Comments	A free-form entry field where you can add any additional information to appear on the purchase order you are docking. *Alphanumeric, 25 positions; optional.*
Generate labels	Indicates whether to print carton labels for the purchase order. Valid values are: • Selected (default) = print carton labels • Unselected = do not print carton labels The system will generate one label for each carton. **Note:** Generating carton labels is not currently implemented.
Label printer	The ID of the printer used to print carton labels. The system validates that the printer ID you enter is a valid printer ID defined in Working with Admin Properties (CPRP); if the printer ID you enter is not valid, an error message displays: `Invalid Printer`. *Alphanumeric, 10 positions; required if the Generate labels field is selected.*

Primary Location Not Defined for PO

A message such as the following displays when you try to dock a purchase order containing one or more items not assigned to a primary location:

```
Primary Location not defined for PO (222/1/CRATE).
```

You cannot dock this purchase order until you define a primary location for all of the items on the purchase order. This message is shown if you have the Validate Primary Locations for Purchase Orders (E19) system control value selected.

Printing the Purchase Orders in Docked Status Report (PDPO)

Purpose: The Purchase Orders in Docked Status Report is a list of all the purchase orders that have been docked but not yet received.

When to use: Use the Purchase Orders in Docked Status Report to track the purchase orders that are docked and need to be received. Docking stock provides a record of when the inventory actually arrived at your warehouse, as opposed to when you completed quality control and recorded the receipt. See Docking Purchase Orders (MDPO) .

Printing the Docked but Past Due Purchase Order Report (PDPD)

Purpose: The Docked but Past Due Purchase Orders Report is a list of all the purchase orders that are in a docked status but arrived past their expected delivery date.

When to use: Use the Docked but Past Due Purchase Orders Report to track how many shipments were late in arriving and which vendors exceeded their promised delivery date. This report may be helpful if there is a question on whether the vendor delivered the merchandise on time. See Docking Purchase Orders (MDPO).

Docked But Past Due Screen

Purpose: Use this screen to select the date range to include on the Docked but Past Due Purchase Orders Report.

How to display this screen: Enter PDPD in the *Fast path* field at the top of any menu or select Print Past Due Docked Report from a menu.

Field	Description
Docked start date	The starting date from which you want to run this report. *Numeric, 6 positions (user date format); required.*
Docked end date	The ending date up through which you want to run this report. Enter the same date you entered in the *Docked start date* field if you want to run the report for a single day. *Numeric, 6 positions (user date format); required.*

Instructions: To print the Docked but Past Due Purchase Orders Report.

1. Complete the *Docked start date* and *Docked end date* fields.
2. Select Accept to print the report.

Warehouse Management Integration

In this part: This part includes the following topics:

- Warehouse Management System Integration Overview: Provides an overview of the Warehouse Management Integration.
- Generic Outbound Purchase Order API: Describes how to send purchase order information to an external system.
- Purchase Order Receipt In API: Describes how to process PO receipts received through the generic API.
- Generic Pick In API (Shipments, Voids, and Backorders): Describes how to confirm shipments or void pick slips through the generic API.

For more information see the Order Administration Web Services Guide on https://support.oracle.com My Oracle Support (ID 2953017.1).

Working with PO Receipt Errors (WPRE)

Purpose: Use this menu option to review errors resulting from the *Purchase Order Receipt In API*. These errors are stored in the PO Receipt Error table. See *Purchase Order Receipt In API* for more information, and see *PO Receipt Errors* for an explanation of errors.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Work with PO Receipt Errors Screen

Use this screen to review errors in the *PO Receipt In XML Message (CWReceiptIn)* received from another system.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Errors display on this screen in error date, PO #, PO line # sequence.

How to display this screen: Enter WPRE in the *Fast path* field at the top of any menu or select Work with PO Receipt Errors from a menu.

Field	Description
Error date	The date when the *PO Receipt In XML Message (CWReceiptIn)* was received. This might be different from the *receipt_date* in the message. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). Enter a valid date and select OK to display PO receipt errors that match your entry. *Numeric, 6 positions (user date format); optional.*
PO#	The *po_nbr* passed in the message. *Numeric, 7 positions; display-only.* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Field	Description
PO Line#	The *po_line_seq_nbr* passed in the message. For more information see the Web Services Guide on My Oracle Support (ID 2953017.1). *Numeric, 5 positions; display-only.*
Quantity	The *quantity* passed in the message. *Numeric, 7 positions; display-only.* For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).
Error	A description of the error. See *PO Receipt Errors* for a list of errors. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). *Alphanumeric, 40 positions; display-only.*

Screen Option	Procedure
Correct a PO receipt that is in error	Select Change for a PO receipt error record to advance to the Change PO Receipt Error Screen.
Delete a PO receipt that is in error	Select Delete for a PO receipt error record to delete it.
Review a PO receipt that is in error	Select Display for a PO receipt error record to advance to the Display PO Receipt Error screen. You cannot change any information on this screen. See the Change PO Receipt Error Screen for field descriptions.
Advance to Inventory Inquiry for the item associated with the PO receipt that is in error	Select Inventory Inquiry for a PO receipt error record to advance to the Display Item/Warehouse Information Screen. An error message similar to the following displays if the item/SKU for the PO receipt that is in error cannot be determined: `PO Detail not found.`
Advance to Purchase Order Inquiry for the PO associated with the PO receipt that is in error	Select PO Inquiry for a PO receipt error record to advance to the First Display Purchase Order Detail Screen. An error message similar to the following displays if the PO # for the PO receipt that is in error cannot be determined: `PO# is invalid.`
Reprocess a PO receipt that is in error	Select Reprocess for a PO receipt error record to reprocess it.
Reprocess all PO receipt records that are in error	Select Reprocess to reprocess all PO receipt error records.
Delete all PO receipt records that are in error	Select Delete all to advance to the Confirm Delete window. Select OK to delete all records; otherwise select Exit to cancel the delete.

Change PO Receipt Error Screen

Purpose: Use this screen to correct the error associated with a PO receipt transaction received through the *Purchase Order Receipt In API*.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

> **Note:**
>
> When you select OK on this screen the system validates that the PO receipt transaction no longer contains errors. If an error exists for the PO receipt transaction, the system displays the error on the screen. You will need to correct the error and select OK, or select Exit to exit the screen without correcting the error. Once you correct all errors associated with the PO receipt transaction, you will need to select Reprocess for the PO receipt transaction in order to process the transaction.

How to display this screen: Select Change for a PO Receipt Error record at the Work with PO Receipt Errors Screen.

Field	Description
Type	Receipt indicates the transaction is a PO receipt transaction. *Required.*
PO#	The PO number that contains the PO line to receive. *Numeric, 7 positions; required.*
PO Line seq#	The PO line sequence number to receive. *Numeric, 5 positions; required.*
Item/SKU	The code for the item and SKU that is defined for the PO line to receive. *Item: Alphanumeric, 12 positions; required.* *SKU: Alphanumeric, 14 positions; required if the item contains SKUs.*
Vendor item	The code for the vendor item defined for the item to receive. *Alphanumeric, 20 positions; optional.*
UPC Type	The type of UPC code defined for the item to receive. Valid values: • Blank = No UPC code. • **EAN-13** • **EAN-8** • **UPC-A** • **UPC-E**
UPC code	The UPC code defined for the item to receive. *Alphanumeric, 14 positions; optional.*
Short SKU	The short SKU code defined for the item to receive. *Numeric, 7 positions; optional.*
Retail ref#	The retail reference number defined for the item to receive. *Numeric, 15 positions; optional.*
Quantity	The quantity of the item on the PO line to receive. *Numeric, 7 positions; required.*

Field	Description
Receipt date	The date the item on the PO line was received into the specified location in the warehouse. *Numeric, 6 positions (user date format); required.*
Receipt time	The time the item on the PO line was received into the specified location and warehouse. *Numeric, 6 positions (HH:MM:SS format); required.*
Cost	The cost of the item. In order to update this field you must have authority to the Override PO Cost (A17) secured feature; otherwise, the *Cost* field is display-only. *Numeric, 11 positions with a 4-place decimal; optional.*
Currency rate	The currency rate defined for the item. *Numeric, 11 positions with a 7-place decimal; optional.*
Customs date	The customs date defined for the item to receive. *Numeric, 6 positions (user date format); optional.*
Whs	A code for the warehouse where the item on the PO line is received. *Numeric, 3 positions; required.*
Location	A code for the location in the warehouse where the item on the PO line is received. *Alphanumeric, 7 positions; required.*
Non-inventory	Indicates whether the item is a non-inventory item. • Selected = The item is a non-inventory item. • Unselected = The item is an inventoried item.
Error	A description of the error associated with the PO receipt transaction. *Alphanumeric, 40 positions; display-only.*

Working with Pick Invoice Errors (WPIE)

Purpose: Use this menu option to review errors resulting from the *Generic Pick In API (Shipments, Voids, and Backorders)*. These errors are stored in the Pick In Error table. See *Pick In Process Overview* for more information, and see Pick Invoice Errors for an explanation of errors.

You cannot correct and resubmit pick in messages through this option. To correct any errors, use the *Generic Pick In API (Shipments, Voids, and Backorders)* to submit a new message.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

In this topic:

- Work with Pick Invoice Errors Screen
- Pick Invoice Errors

Work with Pick Invoice Errors Screen

How to display this screen: Enter WPIE in the *Fast path* field at the top of any menu, or select Work with Pick Invoice Errors from a menu.

Field	Description
Date	The date when the *CWPickIn XML Message* was received. This might be different from the `date_sent` in the message. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). *Numeric, 6 positions (user date format): optional.*
Pick ctrl #	The `pick_control` number passed in the message. *Numeric, 7 positions; optional.*
Order #	The order number associated with the `pick_control` number. The order number is 0 if the system cannot find an order number to match the `pick_control` number. *Numeric, 8 positions; optional.*
Pick Line #	The pick detail line number related to the error. Included only if the error is `Shipped Quantity cannot exceed Printed`; otherwise, the pick line number displayed is 0. *Numeric, 5 positions; display-only.*
Carton #	The carton number related to the error. Included only if the error is `Invalid/Missing Carton Number` or if the error is related to information in the carton elements; otherwise, the carton number displayed is 0. *Numeric, 5 positions; display-only.*

Deleting errors: Select Delete for an error to delete it, or select Delete All to delete all existing errors in your company.

Pick Invoice Errors

The following errors are tracked in the Pick In Error table and are available for review at the Work with Pick Invoice Errors Screen. See *Troubleshooting the Pick In API* for more information on correcting problems with the Pick In API.

For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Error	Explanation
Active Procedure exists	Occurs when: • Someone is in the process of working with the pick slip in Reprinting and Voiding Pick Slips (WVRP or WSVP). • The system is processing a *CWPickIn XML Message* or performing manifesting for the same pick number and pick control number; the system creates the active procedure for the specific pick control number and label number and removes the active procedure once processing completes. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1).

Error	Explanation
Invalid Pick Control Number	The pick control number does not exist or is not in a valid status for update through the Pick In API (for example, the pick control number is in a pre-generated pick status (G Generated No Authorization or H Generated Has Authorization status) or V Voided status).
Invalid Pick Control Number-Pick has been billed	You have already confirmed shipment of the pick control number.
Invalid Ship Via on Carton Header	The `ship_via` indicated in the `CartonHeader` element does not exist in the ship via table; see Working with Ship Via Codes (WVIA) for more information. Occurs for confirmation (C), void/keep reservation (R), or partial backorder (B) transaction types only.
Invalid Transaction Type	The `transaction_type` was something other than B, C, U, R, or V, or was not specified.
Invalid/Missing Carton Number	Occurs if no `carton_nbr` is indicated.
Invalid/Missing Pick Line on Carton Detail	The `pick_line_nbr` indicated in a `CartonDetail` element is not a valid line number for the pick slip, or no `pick_line_nbr` was indicated. Occurs for confirmation (C), void/keep reservation (R), or partial backorder (B) transaction types only.
Invalid/Missing Pick Line on Pick Detail	There is a `pick_line_nbr` indicated `PickDetail` element that is not a valid line number for the pick slip. Occurs for the partial backorder (B) and void/keep reservation (R) transaction types only.
Pick Detail required for Backorder	There was not at least one `PickDetail` element specified. Occurs for partial backorder (B) transaction types only.
Set component quantity not divisable into set qty.	There were inconsistent shipped quantities indicated for set components that would result in incomplete shipment of a set. For example, this error can occur if a set consists of 1 unit of COMPONENT1 and 2 units of COMPONENT2, and the message indicated a shipment of 1 unit of each component. The CWPickIn message for a set item should include a shipped quantity for just the main set item and not the components, as described above under *Pick In Process Overview*. For more information see the Order Administration Web Services Guide on My Oracle Support (ID 2953017.1). If you would like the CWPickIn message to include the components as well as the main set item, the shipped quantities must represent a complete shipment of one or more units of the set. Occurs for partial backorder (B) transaction types only.
Shipped Quantity cannot exceed Printed	The `qty_shipped` indicated in a `PickDetail` element exceeds the printed quantity on the pick slip. Occurs for partial backorder (B) and void/keep reservation (R) transaction types only.

Working with Warehouse Cross-Reference (WWXR)

Purpose: This option is not currently supported.