Oracle® Retail Order Orchestration Cloud Service

Vendor Portal Online Help

Release 24.1.201.0
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Oracle Retail Order Orchestration Cloud Service Vendor Portal Online Help, Release 24.1.201.0

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Preface

Oracle Retail Order Orchestration Cloud Service includes the following modules:

- Routing Engine: Distributed order broker that determines inventory availability across the enterprise, and uses advanced business rules to select locations that can fulfill orders.
- Supplier Direct Fulfillment: Web-based vendor portal enabling vendors to share purchase orders and shipping information to simplify drop shipment.
- Store Connect: Web portal that enables store associates to process and fulfill omni-channel orders.

Overview

This guide describes the screen a vendor uses to work with purchase orders assigned for fulfillment.

We welcome your comments and suggestions to improve the content. Please send us your feedback at retail-doc_us@oracle.com.

Audience

This document is intended for vendors who use the Vendor Portal provided by Oracle Retail Order Orchestration Cloud Service.

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

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 Oracle Help Center at https://docs.oracle.com/en/industries/retail/index.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 Orchestration Cloud Service 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.

1 Vendor Portal Overview

Purpose: The Vendor Portal provides a way for you and the retailer to collaborate on the fulfillment of drop ship purchase orders.

Typical Process Flow

A typical process flow for a purchase order includes the following (see *Integrated Vendor Process Flow*, below, for an alternate flow):

1: Receive purchase orders: The retailer sends you drop ship purchase orders for fulfillment. The purchase order originates from a sales order placed with the retailer, and can include one or more items for you to fulfill.

When the retailer sends you a purchase order, you may receive an email notification based on the settings on the Preferences tab of the *Vendor Configuration* screen. Also, the number of new purchase orders is noted at the Vendor Portal *Home Screen*.

2: Generate pack slips: You use the *Select Purchase Orders* screen to select purchase orders for pack slip generation. You can generate pack slips for all new purchase orders, or select by purchase order or by item.

Once you generate a batch of pack slips, you advance to the *View Printed Pack Slips* screen. From this screen, you can:

- print the *Pack Slip*.
- print the *Pack Slip Batch Pullsheet* to assist in picking.
- download a *Pack Slip CSV File*.

The options that the retailer makes available at the *View Printed Pack Slips* screen vary, depending on your requirements.

3: Confirm shipments: To confirm shipment of pack slips, you can use the:

- *Integrated Shipping* screen to confirm shipments through an integrated shipping system.
- *Purchase Order Shipping* screen to enter shipment confirmations.
- *Purchase Order Shipping Upload* screen to confirm shipments by uploading a CSV file. Based on the settings on the Preferences tab of the *Vendor Configuration* screen, you may receive an email notification when an error occurs during upload.

4: Submit invoices: If the retailer supports invoicing through the Vendor Portal, you can use the:

- *Purchase Order Shipping* screen to specify an invoice number for a group of shipments.
- *Invoice Creation* screen to create an invoice for one or more shipments.
- *Invoice Upload* screen to create invoices for one or more shipments by uploading a CSV file. Based on the settings on the Preferences tab of the *Vendor Configuration* screen, you may receive an email notification when an error occurs during upload.

For more information: See the *Create Invoice Confirmation* window for background on invoice submission and statuses when you use the Vendor Portal screens to create or edit an invoice, or see the *Invoice Upload* screen for background on the invoice upload process.

Process Flow Variations and Additional Options

Maintain: You can use the *Purchase Order Maintenance* screen to:

- change the expected shipment date for an item on a purchase order.
- put an item on hold if, for example, you do not think that you will be able to fulfill the item, and are requesting that the retailer cancel it.
- release an item from hold.
- enter a note about the item on the purchase order.

Address changes or cancellations: You can use the *Purchase Order Change Requests* screen to accept or reject address change or cancellation requests from the retailer. Based on the settings on the Preferences tab of the *Vendor Configuration* screen, you may receive an email notification when the retailer submits one of these requests.

Purchase order inquiry: You can use the *Purchase Order Inquiry* screen to select purchase orders for review. Once you select a purchase order, you advance to the *Purchase Order* screen, displaying detailed information about the purchase order, including history, messages, special handling instructions, and invoices.

Voiding or reprinting pack slips: You can use the *Void / Reprint Pack Slip* screen or the **Reprint Pack Slip** option at the *Purchase Order* screen to void and reprint a pack slip. You can also use the *Void / Reprint Pack Slip* to void (cancel) the item(s) on a pack slip without reprinting.

Invoice inquiry: Optionally, you can use the *Invoice Inquiry* screen to select invoices for modification of the default information and the shipments the invoice includes. If you change the unit cost for a shipment (higher or lower) beyond the *Unit Cost Threshold* defined by the retailer, the item is flagged as **out-of-balance**, and the invoice does not post automatically to the retailer’s system; instead, the invoice is **Held**, and the retailer needs to accept or reject it.

Email Notifications

The Vendor Portal generates email notifications using the email addresses specified at **Preferences** tab of the *Vendor Configuration* screen:

- **New PO Notification:** when the retailer submits one or more new purchase orders for fulfillment.
- **Change Requests:** when the retailer submits one or more address change or cancellation requests,
- **Shipment Upload Error or Invoice Upload Error:** when an error occurs for a shipment or invoice upload. The email includes a link to the error reason and the data in error.
- **Out of Balance Invoices Approved or Rejected:** when the retailer approves or rejects a held invoice that includes a line that is out-of-balance. The email lists the invoice number and indicates whether it was approved or rejected.

Email localization:

- The language, date/time formats, and numeric formats used in these emails are defined at the *Vendor Configuration* screen.
- The Vendor Portal link embedded in emails opens the Vendor Portal using the default locale for the retailer, which may differ from the **Language** defined at the *Vendor Configuration* screen.

Integrated Vendor Process Flow

As an alternative to using the Vendor Portal screens for all processing, an integrated vendor can use the integration to receive and confirm shipment of purchase orders if the retailer supports this option.

Included in the vendor integration: The vendor integration includes:

- sending batches of new purchase orders to the vendor's system when the vendor's system requests them
- enabling the vendor's system to acknowledge receipt of a batch of purchase orders
- confirming shipments of purchase orders, including the carrier (ship via) used, tracking number, weight, shipment date, and freight charges

Typical integration process if you are an integrated vendor:

- **Creation:** Purchase orders are created in the Vendor Portal (the status is **New Order** and no batch number are assigned yet).
- **Get purchase orders:**
  - The vendor system sends a request message to the Vendor Portal.
  - The response message from the vendor portal includes the new purchase orders. At this time:
    - a batch number is assigned to the purchase orders included in the response message.
    - the pack slip PDF, pack slip CSV, and pullsheet are generated, if specified at the **Pack Slip** folder under the **Preferences** tab of the *Vendor Configuration* screen.
- **Acknowledgement required?**
  - **Not required:** If your system is not configured to require an acknowledgement, the status of the purchase orders in the response message changes automatically to **In Process**.
  - **Required:** Otherwise, if your system is configured to require acknowledgment, the status of the purchase orders remains **New Order** until your system acknowledges receipt of the batch:
    - Your system sends an acknowledgement message to the Vendor Portal, specifying the batch received.
    - The Vendor Portal sends an acknowledgement response. At this time, the status of the purchase orders changes to **In Process**.
- **Confirm shipment**: Optionally, as an alternative to using the shipment screens available in the Vendor Portal:
  - You use a shipment confirmation message to the Vendor Portal to specify the purchase order, line number(s), and quantity shipped for each line, including the carrier used, tracking number, shipment date, weight, and meter charges.
  - The Vendor Portal sends a shipment acknowledgement message.

Additional Vendor Portal options: An integrated vendor can still use the regular Vendor Portal screens, including the shipment confirmation screen options, with the exception of the *Select Purchase Orders* screen, which is not available to vendors flagged for integration. The Get Purchase Order screen is also available to generate pack slips. See *Typical Process Flow* and *Process Flow Variations and Additional Options*, above, for more information.

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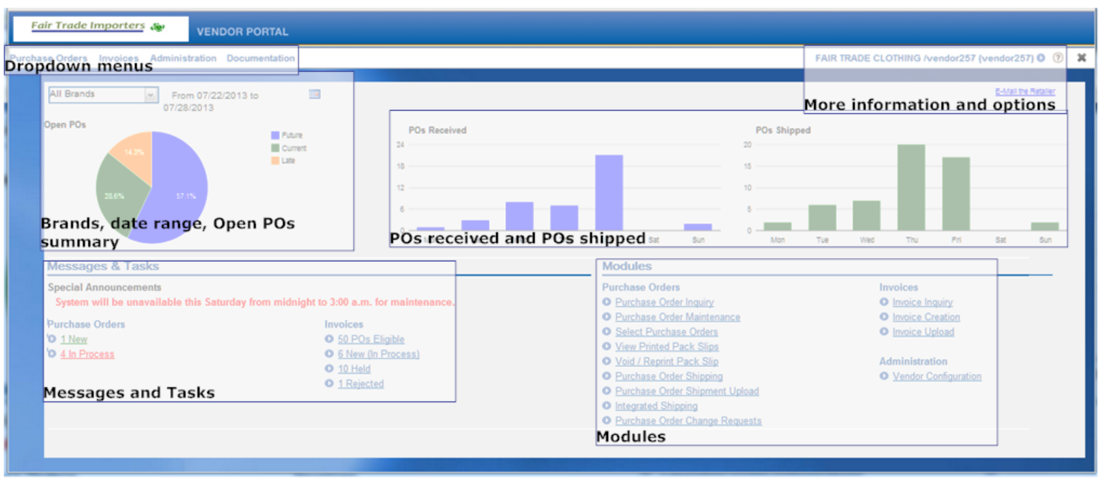
Home Screen

Purpose: The home screen is the first screen that opens when you log into the Vendor Portal. From this screen, you can review summary information about the purchase orders assigned to you for fulfillment, communicate with the retailer, and advance to the modules you use to work with purchase orders.

For more information: See the *Vendor Portal Overview* for background on the process of fulfilling purchase orders for a retailer through the Vendor Portal.

Refreshing the information on this screen: The Vendor Portal automatically refreshes (updates) the information on this screen at an interval specified by the retailer. You can also refresh the information by logging out of the Vendor Portal and then logging back in.

Home screen orientation: The home screen includes the sections highlighted below:



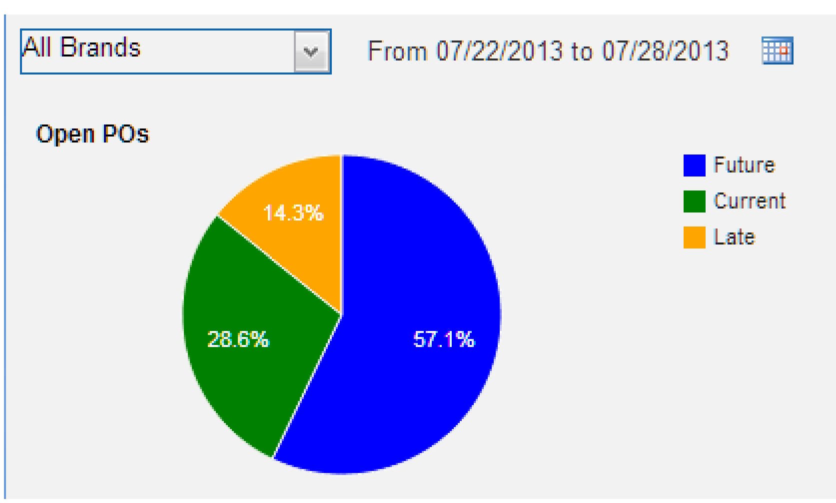
Contents of this screen:

- *Brands, date range, Open POs summary*
  - Selecting a brand
  - Changing the date range
  - Open POs summary pie chart
- *POs received and POs shipped*
  - POs Received
  - POs Shipped
- *Messages and Tasks*
  - Special Announcements
  - Purchase Order Tasks
  - Invoices Tasks

- *Modules*
  - Purchase Orders
    - *Purchase Order Inquiry*
    - *Purchase Order Maintenance*
    - *Select Purchase Orders* or *Get Purchase Orders*
    - *View Printed Pack Slips*
    - *Void / Reprint Pack Slip*
    - *Purchase Order Shipping*
    - *Purchase Order Shipping Upload*
    - *Integrated Shipping*
    - *Purchase Order Change Requests*
  - Invoices
    - *Invoice Inquiry*
    - *Invoice Creation*
    - *Invoice Upload*
- Administration:*Vendor Configuration*
- Dropdown menus
- More information and options
  - Login information
  - Email the retailer

> **Note:**
>
> Internet access is required to render the charts and graphs on this screen. Notify the retailer if they do not render correctly.

Brands, date range, Open POs summary



Selecting a brand

Optionally, select a brand from the dropdown list to restrict the information displayed in the Open POs summary pie chart and the POs received and POs shipped charts to purchase orders for that brand only.

All brands defined by the retailer are available for selection, regardless of whether any purchase orders for the brand are assigned to you for fulfillment. If you select a brand, and you are not assigned any purchase orders for that brand, the Open POs summary pie chart and the POs received and POs shipped charts will be blank.

Changing the date range

The date range displayed in the POs received and POs shipped charts defaults to the current week, ending with the current date in your local time zone. For example, if you log in on Monday, 7/29, the default date range displayed is Tuesday 7/23 through Monday 7/29.

To change the date range, click the calendar control and select a different ending date for your local time zone. The POs received and POs shipped charts then display a week of dates ending with your selection. For example, if you select Sunday, June 30, the dates displayed change to Monday, 6/24 through Sunday, 6/30, and the POs received and POs shipped charts list information for that range of days.

Open POs summary pie chart

Future/current/late/very late purchase orders: The pie chart on this screen indicates the percentages of open purchase orders based on the aging of their earliest due dates. The chart uses the following calculation to determine whether the earliest due date on an unshipped, uncanceled purchase order line is future, current, late, or very late, and displays the total number of purchase orders proportionally in each aging bucket:

- **Future:** The due date is at least 7 days in the future. For example, if today is 7/17, the due date must be 7/24 or later.
- **Current:** The due date is the current date or later, but no more than 6 days in the future. For example, if today is 7/17, the due date can be 7/17 through 7/23.
- **Late:** The due date is before the current date, but does not fall into the very late range based on a number of days specified by the retailer. For example, if today is 7/17 and the retailer defines 10 days as “very late,” the due date can be 7/7 through 7/16.
- **Very Late:** The due date is at least the number of days old specified by the retailer as “very late.” For example, if today is 7/17 and the retailer specifies 10 days as “very late,” the due date can be 7/6 or earlier.

Displaying the number of purchase orders in each aging bucket: Hold the pointer over a section of the pie chart to display the number of purchase orders included in that bucket.

Aging key: A key next to the pie chart indicates the color used to represent each aging bucket. If there are no purchase orders within that aging bucket, the bucket is not included in the key. For example, yellow indicates the **Late** aging bucket; however, if there are no purchase orders assigned to you that fit into the **Late** aging bucket, then **Late** is not included in the key.

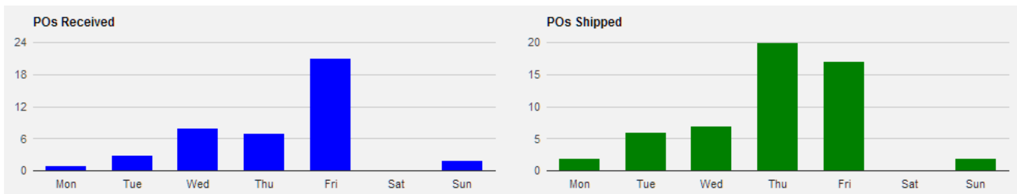
Based on original or revised due date: The calculation is based on the revised due date, if you have revised it; otherwise, it is based on the original due date specified by the retailer.

Statuses: Purchase order lines in **New Order**, **In Process**, and **Held** status are included in the calculation. **Shipped** and **Canceled** lines are not included. See the *Commonly used terms* for a discussion of statuses.

Restricting by brand: See *Selecting a brand*, above, for information on restricting the data for the pie chart to a specific brand.

POs received and POs shipped

Overview: This area of the screen includes bar charts indicating the total number of POs received and POs shipped.

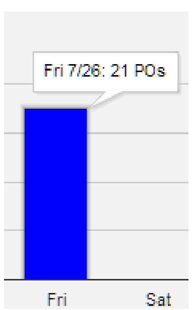


POs Received

This chart indicates the number of purchase orders that the retailer submitted to you for fulfillment during the current week.

Number scale: The numbers to the left of the chart are proportional to the highest number of purchase orders you received for the days displayed; for example, if the highest number of purchase orders you received on any one day of the week was 19, the highest number displayed to the left is 24.

Displaying the exact number of purchase orders received by date: Hold the pointer over the bar for a day to display the number of purchase orders received on that date.



Changing the date range: See *Changing the date range*, above, for information on how to change the range of dates displayed in this chart.

Restricting by brand: See *Selecting a brand*, above, for information on restricting the data for the chart to a specific brand.

POs Shipped

This chart indicates the number of purchase orders that you shipped during the current week. The totals by day are based on the **Ship Date** you specified when confirming the shipment, whether through the *Integrated Shipping* screen, the *Purchase Order*

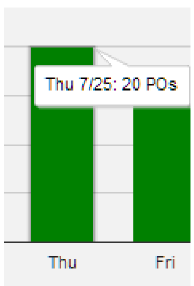
Shipping screen, the *Purchase Order Shipping Upload* screen, or the *vendor integration*.

Multiple shipments? The total for each date is based on the number of purchase orders with shipments on that date. Even if you shipped individual lines on a purchase order separately on the same **Ship Date**, the purchase order increases the total by one for that date. For example, if a purchase order has two lines, and you ship the two lines separately on the same date, the entire purchase order increases the shipment total by one.

If you ship a purchase order across multiple dates, then the purchase order is included in the total for each **Ship Date**. For example, if you ship one line on a purchase order on 7/29, and ship the other line on the purchase order on 7/30, you increase the totals for both 7/29 and 7/30 by one.

Number scale: The numbers to the left of the chart are proportional to the highest number of purchase orders you shipped for days displayed; for example, if the highest number of purchase orders you shipped on one day was 19, the highest number displayed to the left is 24.

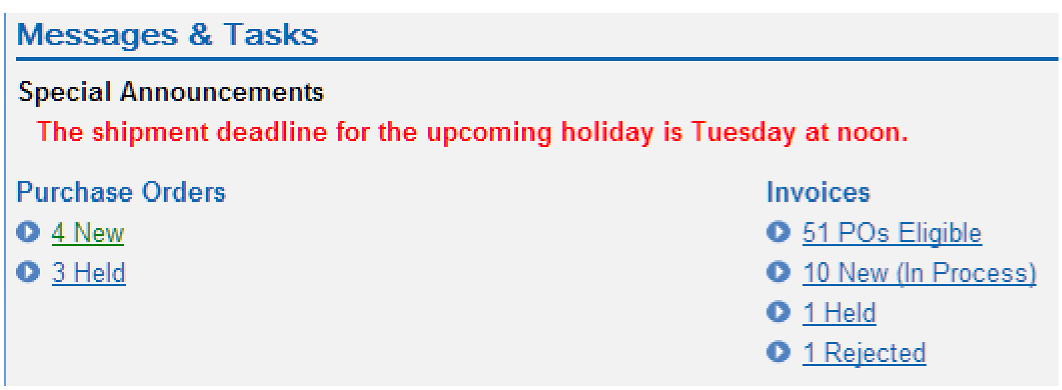
Displaying the exact number of purchase orders shipped by date: Hold the pointer over the bar for a day to display the number of purchase orders shipped using that **Ship Date**.



Changing the date range: See *Changing the date range*, above, for information on how to change the range of dates displayed in this chart.

Restricting by brand: See *Selecting a brand*, above, for information on restricting the data for the pie chart to a specific brand.

Messages and Tasks



Purchase Orders tasks

This area summarizes the number of outstanding tasks related to purchase orders, with each summary providing a link to a related screen.

Information displayed? This information is displayed only if there are purchase orders that meet the status criteria described below.

This area of the screen does not include purchase orders whose status is **Complete**, **Canceled**, or **Shipped**. See the *Commonly used terms* for a definition of each purchase order status.

Required authority: If you do not have the required authority to any of the tasks, the tasks are grayed out on the screen.

Status	Click to advance to:	Count is based on:	Example
New	*Select Purchase Orders* screen	The total number of purchase orders that are still in **New Order** status or that include any lines in **New Order** status, indicating that you have not yet generated pack slips.	A purchase order includes a line in **New Order** status and another line in **Canceled** status if the retailer has submitted a cancellation request, and you have accepted; this purchase order increases the **New** total by one. Another purchase order includes two lines in **New Order** status; this purchase order also increases the **New** total by one.
	Get Purchase Orders (if using the *vendor integration*	If using the *vendor integration*: The total number of purchase orders that are still in **New Order** status or that include any lines in **New Order** status, indicating that the integrated system has not yet received the purchase order or acknowledged the purchase order, depending on the setting of the *Require Acknowledgement* flag.	

Status	Click to advance to:	Count is based on:	Example
In Process	*Integrated Shipping* screen, if enabled; otherwise, the *Purchase Order Shipping* screen	The total number of purchase orders in **In Process** status, indicating that you have generated pack slips or but not yet confirmed shipments. If using the *vendor integration*: The total number of purchase orders that have been sent to or acknowledged by the integrated system, depending on the setting of the *Require Acknowledgement* flag.	A purchase order includes lines on two different pack slips if you held a line and then released it when inventory was available; if both lines are now still in process, this purchase order increases the **In Process** total by one.
Held	*Purchase Order Maintenance* screen	The total number of purchase orders that include lines you have put in **Held** status at the **Purchase Order Maintenance** screen.	A purchase order includes two held lines; this purchase order still increases the **Held** total by one.
Cancellation	*Purchase Order Change Requests* screen	The total number of outstanding cancellation requests for lines that are **In Process** or **Held**. This total is based on the individual lines that the retailer has requested that you cancel.	A purchase order includes two in process lines, with outstanding cancel requests for each line; this purchase order increases the **Cancellation** total by two.
Address Change	*Purchase Order Change Requests* screen	The total number outstanding address change requests for purchase orders that are in process or held.	A purchase order includes two lines, one in process and one held; this purchase order increases the **Address Change** total by one.

Invoices tasks

This area summarizes the number of outstanding tasks related to invoices, with each summary providing a link to a related screen.

This area of the screen does not include invoices whose status is **Posted**. See the *Commonly used terms* for a description of invoice statuses.

Information displayed? This information is displayed only if the retailer has flagged you to use the Vendor Portal to create invoices. Also, even if you are flagged for invoicing through the Vendor Portal, each status is displayed only if there are purchase orders or invoices that meet the status criteria described below.

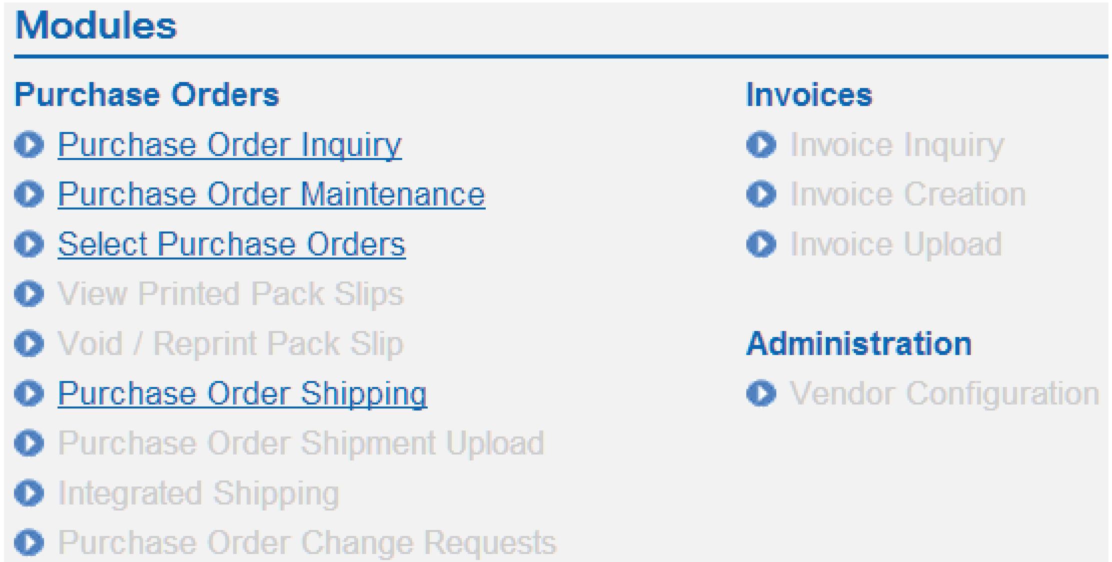
Required authority: If you do not have the required authority to any of the tasks, they are grayed out on the screen.

Status	Click to advance to:	Count is based on:	Example
POs Eligible	*Invoice Creation* screen	The total number of purchase orders that include shipped lines that have not yet been included on an invoice.	A purchase order includes two lines that were shipped separately; this purchase order increases the POs eligible total by one.
New (In Process)	*Invoice Inquiry* screen	The total number of invoices that you have saved for changes and not yet submitted to the retailer for payment. Note that an invoice can include one or more purchase order lines or purchase orders.	An invoice includes one of two shipped lines on one purchase order, and two shipped lines on a second purchase order; the invoice increases the New (In Process) total by one.
Held	*Invoice Inquiry* screen	The total number of invoices that you have submitted to the retailer and that include at least one **out-of-balance** line. A held invoice remains in **Held** status until the retailer approves or rejects it.	An invoice includes two out-of-balance lines and one line that is not out of balance; the invoice increases the **Held** total by one.
Rejected	*Invoice Inquiry*screen	The total number of invoices that you submitted to the retailer with at least one **out-of-balance** line, and that the retailer rejected. You can change the invoice so that it no longer includes an out-of-balance line, or you can delete the invoice.	An invoice rejected by the retailer included three purchase orders, and two lines on one of the purchase orders was out-of-balance; the invoice increases the **Rejected** total by one.

Modules

Overview: This area of the screen includes links to the major modules available in the Vendor Portal. Only modules to which you have authority have live links; other modules are grayed out.

Modules that may be available through these links, based on your authority, are listed below. You can also advance to any module to which you have authority through the dropdown menus.



Purchase Orders

- *Purchase Order Inquiry*: review purchase orders of any status, and optionally put a purchase order line on hold or revise the due date.
- *Purchase Order Maintenance*: put a purchase order line on hold, release it from hold, or revise the due date.
- *Select Purchase Orders*: generate pack slips and pullsheets, and generate a *CSV* file for extract to your system or to open in a spreadsheet application such as Microsoft Excel. Not available if you use the *vendor integration*. See *Integrated Vendor Process Flow* for background.
- *Get Purchase Orders*: generate pack slips if you are using the *vendor integration*.
- *View Printed Pack Slips*: print pack slips or pullsheets, or download a *CSV* file for extract to your system or to open in a spreadsheet application such as Microsoft Excel.
- *Void / Reprint Pack Slip*: reprint a pack slip with the original purchase order line quantity or less, or void the pack slip by specifying a quantity of 0.
- *Purchase Order Shipping*: confirm shipments for purchase orders and optionally create an invoice, based on your authority.
- *Purchase Order Shipping Upload*: upload a *CSV* file of shipment confirmations for purchase orders.
- *Integrated Shipping*: confirm shipments for purchase orders through an integrated shipping system.
- *Purchase Order Change Requests*: review, accept, or reject address changes or cancel requests for **In Process** or **Held** purchase order lines from the retailer.
- *Invoice Inquiry*: review invoices you have created; modify invoices that you have saved for changes; delete invoices if needed; submit invoices to the retailer if they have not already been submitted.
- *Invoice Creation*: create invoices to the retailer for one or more shipments.
- *Invoice Upload*: upload a *CSV* file of invoice information for shipments.

- *Vendor Configuration*: review the retailer's information about your contact and return address and configuration settings and assigned carriers; review or update email addresses for notifications; review and work with settings related to the *vendor integration*.

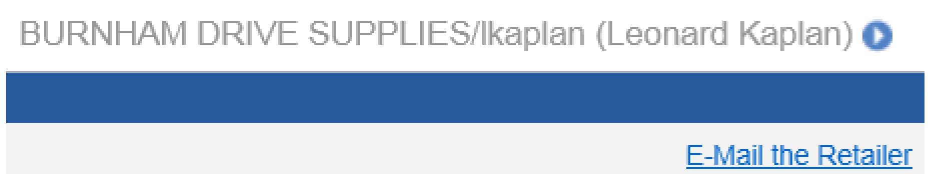
Special Announcements

This area displays any current special announcement from the retailer. If there is no current announcement, the heading is not displayed.

Dropdown Menus

Overview: You can use these dropdown menus to select any of the modules listed under the Modules area. See that area, above,for more information.

More information and options



Login information

This area displays:

- the name of your company
- your user ID, separated by the name of your company by a slash
- your user name in parentheses

E-Mail the Retailer

Click this link to open your default email program with the retailer's contact email address in the **To** field. This link is available only if the retailer has specified an email address.

> **Note:**
>
> If you are using Chrome, a blank tab opens when you click the email link.

3 Purchase Orders Menu

- *Purchase Order Inquiry*
  - *Purchase Order*
  - *Browse Detail Customizations*
  - *Browse Purchase Order Detail Messages*
  - *Edit Purchase Order Item*
  - *Display Purchase Order Item*
  - *Purchase Order History Detail*
- *Purchase Order Maintenance*
- *Select Purchase Orders* (not available if you use the *vendor integration*)
  - *Generate Pack Slip Confirmation*
- *Get Purchase Orders* (available if you use the *vendor integration*)
- *View Printed Pack Slips*
  - *Pack Slip*
  - *Pack Slip Batch Pullsheet*
  - *Pack Slip CSV File*
- *Void / Reprint Pack Slip*
  - *Select Batch*
  - *Void / Reprint Pack Slip Confirmation*
- *Integrated Shipping*
  - *Select Purchase Order*
  - *Estimated Weight and Dimensions*
- *Purchase Order Change Requests*
  - *Purchase Order Address Change Request*
- *Purchase Order Shipping*
  - *Purchase Order Shipping Details*
  - *Create Invoice Confirmation*
- *Purchase Order Shipping Upload*
  - *Purchase Order Shipping Upload - Errors*

Purchase Order Inquiry

Purpose: Use the **Purchase Order Inquiry** screen to search for and review purchase orders.

How to display this screen: Select **Purchase Order Inquiry** from the *Home Screen* or the **Purchase Orders** drop-down menu if you have the required authority.

How to display purchase orders on this screen

When you first advance to the **Purchase Order Inquiry** screen, no purchase orders are displayed. Click **Search** to display purchase orders matching your search criteria or to refresh the purchase orders displayed.

View by purchase order or item: You can use the **View Results By** option to switch the information displayed:

- **Purchase Order:** displays information about the entire purchase order, such as shipping address. With this view, if the purchase order includes more than one line, the **Due Date** displayed is the earliest original or revised due date for all unshipped, uncanceled items. This is the default view.
- **Item:** displays information about the line(s) on the purchase order, such as your item number, the retailer's item number, and the ordered quantity.

Most of the same information is displayed whether you view results by purchase order or by item. The information always displayed includes the purchase order number, the retailer's order number, and the date when the retailer created (entered) the purchase order.

Sort order: The purchase orders are sorted first based on the retailer's PO created (entered) date. Within that date, they are sorted by the date and time when the purchase order was submitted to you for fulfillment.

How to view purchase order updates? Click **Search** to refresh the screen and show current purchase order information.

Customer data replaced with asterisks? Customer data, including name, company, address, phone numbers, and email addresses, on closed purchase orders can be replaced with asterisks. Often, the retailer purges this data a specified number of days after the purchase order is shipped or canceled.

How many records displayed? The screen displays up to 500 purchase orders or items.

Option	Procedure
search for purchase orders and display customer and other header-level information	• Leave the **View Results By** option set to **Purchase Order**. • Optionally, you can enter any search criteria at the top of the screen. See below for descriptions. • Click **Search**. The screen displays up to 500 purchase orders.
search for purchase orders, and include item information among the information displayed	• Set the **View Results By** option to **Item**. • Optionally, you can enter any search criteria at the top of the screen. See below for descriptions. • Click **Search**. The screen displays up to 500 lines on purchase orders. **Case:** The enterable fields on this screen are not case-sensitive for searching; for example, an entry of `po123` matches a purchase order number of `PO123`.

Option	Procedure
view more information about the purchase order	Click the edit/display icon ( ) next to a purchase order or item to advance to the *Purchase Order* screen, where you can view information about the purchase order such as: • sold-to and ship-to customer names and addresses • ship via and shipping instructions • order totals and messages • lines, including any special handling instructions or item-related messages • purchase order line history • invoices that include any lines on the purchase order If you have the required authority, you can also advance to the *Edit Purchase Order Item* window, where you can flag a line for hold or revise the due date. • If the *Purchase Order* screen is already open in another tab, you advance to that screen, where the previously-selected purchase order is displayed. • The information displayed at the *Purchase Order* screen is related to the purchase order as a whole, regardless of whether you have been reviewing results by item or by purchase order.

Fields	Description
Search fields Optionally, complete any of the fields below before you click **Search** to display purchase order or items that match your entries.	

View Results By	Controls whether the information in the *Result fields* includes information about the entire purchase order or the lines on the purchase order. If you set this option to:
	• **Purchase Order** (default): The information displayed includes:
	  – the earliest *Due Date* from the lines on the purchase order
	  – the *Order Status*
	• **Item**: The information displayed includes:
	  – the *Item #*, *Retailer Item #*, and *Ordered Units*
	  – the *Due Date* for the line
	  – the *Line Status*
	Regardless of whether you search by purchase order or item, the results displayed always include the *PO Number*, *Order Number*, and *Customer Ship To*.

PO Number	Optionally, enter a full or partial number or code identifying the purchase order in the originating system to display purchase orders that start with or match your entry. Can include numbers, letters, spaces, or special characters. Up to 30 positions. Not case-sensitive for searching; an entry of `A` or `a` matches an purchase order number of `A12345`.

Fields	Description
Order Number	Optionally, enter a full or partial number or code identifying the sales order in the originating system to display purchase orders whose sales order number starts with your entry. Up to 30 positions. Not case-sensitive for searching; an entry of `A` or `a` matches an order number of `A12345`.
Date Created	Optionally, use the calendar control to select the PO entered date provided by the retailer to display purchase orders with that entered date. Might not be the same as the date when the purchase order became available to you through the Vendor Portal. The Vendor Portal confirms that the date you enter is formatted correctly for your locale.

Fields	Description
Status	Select a status to display purchase orders or lines that are in the selected status. **View Results By setting:** If the **View Results By** option is set to **Purchase Order**, purchase orders that match the selected status are displayed; otherwise, if the **View Results By** option is set to **Item**, lines in the selected status are displayed. Possible statuses are: • **Cancelled:** The retailer has cancelled the line or the entire purchase order. • **Complete (multi-line purchase orders only):** The purchase order includes more than one line, and the line statuses include a combination of **Cancelled** and **Shipped**; there are no remaining open lines. • **Held:** You have held the line(s) on the purchase order from processing. You might put a line on hold if you cannot fulfill it, and are requesting that the retailer cancel it. When a line on a purchase order is on hold, it is not eligible for pack slip generation or to be sent through the *vendor integration*; or, if the purchase order line was already in process, the line is not eligible for shipment confirmation, and if you use the void/reprint option, the held line is omitted from the new pack slip. • **In Process:** You have generated pack slips for the purchase order or line, or sent the purchase order to the integrated system (and acknowledged, if required) if you use the *vendor integration*. • **New Order:** You have not yet generated pack slips for the purchase order or line, or sent the purchase order if you use the *vendor integration*. If you use the vendor integration and are configured to require acknowledgment, the purchase order might have been sent but not yet acknowledged. • **Open (multi-line purchase orders only):** The purchase order includes more than one line, and the line statuses include at least one line that is **Held**, **In Process**, or **New Order**. • **Shipped:** You have confirmed shipment of the purchase order or line. **Note:** If you switch the **View Results By** setting, your selection in this field is cleared, because possible line statuses differ from possible purchase order statuses.

Fields	Description
Item #	Your item number or code. Optionally, enter a full or partial item code to display purchase orders or items if the items start with or match your entry. For example, if you sell items ABC111 and ABC123, entering ABC1 matches both of these items. Up to 35 positions. Not case-sensitive for searching; an entry of `A` or `a` matches an item number of `A12345`.
Retailer Item #	The retailer's item number or code. Optionally, enter a full or partial item code to display purchase orders or items if the retailer's item codes start with or match your entry. For example, if the retailer has item codes XYZ222 and XYZ234, entering XYZ2 matches both of these retailer items. Up to 35 positions. Not case-sensitive for searching; an entry of `A` or `a` matches a retailer item number of `A12345`.
Due Date	Optionally, select a date from the calendar control to display purchase orders or lines whose original (not revised) due dates match your entry. When searching by: • purchase order: select a due date to display purchase orders whose earliest original due date (not revised due date) matches your selection. • item: select a due date to display lines whose original due date (not revised due date) matches your selection.
Result fields	
PO Number	The number or code identifying the purchase order in the originating system.
Order Number	The number or code identifying the sales order in the originating system.
Customer Ship To	The name from the shipping address on the purchase order, including the customer's first and last name, or the company name, or both. **Customer data replaced with asterisks?** Customer data, including name, company, address, phone numbers, and email addresses, on closed purchase orders can be replaced with asterisks. Often, the retailer purges this data a specified number of days after the purchase order is shipped or canceled.
Item #	Your item number or code. Displayed only when **View Results By** is set to **Item**. Hold the pointer over the **Item #** to display a description of the item.
Retailer Item #	The retailer's item number or code. Displayed only when **View Results By** is set to **Item**. Hold the pointer over the **Retailer Item #** to display the retailer's description of the item.
Date Created	The PO entered date provided by the retailer. Might not be the same as the date when the purchase order became available to you through the Vendor Portal.

Fields	Description
Due Date	When **View Results By** is set to: • **Purchase Order:** the earliest current (original or revised) due date for an unshipped, uncanceled line on the purchase order. No due date is displayed if all items on the purchase order are shipped or canceled. • **Item:** the original (not revised) due date for the line.
Order Status	The status of the purchase order. Displayed only when **View Results By** is set to **Purchase Order**. See the *Status*, above, for more information.
State	The state where the purchase order ships. Displayed only when **View Results By** is set to **Purchase Order**.
Country	The code identifying the country where the purchase order ships. Displayed only when **View Results By** is set to **Purchase Order**.
Postal Code	The postal or zip code where the purchase order ships. Displayed only when **View Results By** is set to **Purchase Order**.
Line Status	The status of the line on the purchase order. Displayed only when **View Results By** is set to **Item**. See the *Status*, above, for more information.
Ordered Units	The total number of units of the item to ship. Displayed only when **View Results By** is set to **Item**.
Display	Click the Display icon ( ) to advance to the *Purchase Order* screen, where you can review the details of the purchase order, such as the sold-to and ship-to address, items, history, and messages.

Purchase Order

Purpose: Use the **Purchase Order** screen to review detailed information about a purchase order, including:

- the sold-to and ship-to addresses
- shipping instructions and messages
- the lines on the purchase order, including any special handling instructions or line-specific messages
- history of activity related to the purchase order, such as processing and shipment, or cancellation, address change, cost change, or due date revision
- invoices that include any lines on the purchase order.

Reviewing purchase order information: Open the tab related to the information to be reviewed:

- **Header tab:** order summary information, including the sold-to customer and the shipping address. This tab is open by default. See *Header tab: Header summary fields* and *Header tab: Address fields*, below, for more information.

  Customer data replaced with asterisks? Customer data, including name, company, address, phone numbers, and email addresses, on closed purchase orders can be replaced with asterisks. Often, the retailer purges this data a specified number of days after the purchase order is shipped or canceled.

> **Note:**
>
> The *Purchase Order Information* at the top of the screen is always displayed regardless of which tab is open.

- **Detail tab:** the lines on the purchase order. See *Detail tab*, below, for more information. From this tab, you can also advance to additional windows displaying:
  - customization instructions: *Browse Detail Customizations* window
  - messages related to a line: *Browse Purchase Order Detail Messages* window
  - additional details about a line, where you can also put the line on hold or revise the due date if you have the required authority: *Display Purchase Order Item* or *Edit Purchase Order Item* window
- **Invoices tab:** information about each invoice that includes any lines from the purchase order. From this tab, you can also advance to the *Invoice* screen.
- **History tab:** activity that has taken place for the purchase order, See the *History tab*, below, for more information. From this tab, you can also advance to the *Purchase Order History Detail* window if there has been an address change request from the retailer.
- **Messages tab:** sales order or gift messages. See the *Messages tab*, below, for more information.

> **Note:**
>
> When you are on this screen, the information displayed is not automatically refreshed. For example, if you review the information at the Header tab and then click the *History tab*, any recent activity that has taken place while you were reviewing the Header tab is not displayed at the History tab. To refresh the information on this screen, exit the screen and then select it again from the *Purchase Order Inquiry* screen.

How to display this screen: Select **Display** for a purchase order at the *Purchase Order Inquiry* screen, or select **PO Inquiry** at the:

- *Purchase Order Maintenance* screen
- *Select Purchase Orders* screen
- *Purchase Order Shipping* screen
- *Purchase Order Change Requests* screen

> **Note:**
>
> If the **Purchase Order** screen was already open in another tab when you clicked the edit icon, you advance to this screen with the previous purchase order information displayed.

Generate pack slip? The **Generate Pack Slip** option is available if there is at least one line on the purchase order in **New Order** status. Only lines in **New Order** status are eligible for pack slip generation.

If you select the **Generate Pack Slip** option, you have an opportunity to confirm your selection before the pack slip is generated for any lines on the purchase order in **New Order** status. For example, if the purchase order includes one line in **New Order** status and one line in **Held** status, the held line is not included on the pack slip.

A PDF icon ( ) appears at the top of the screen once the pack slip generation is complete. Click this icon to advance to the *View Printed Pack Slips* screen to work with the generated files.

> **Note:**
>
> This option is not implemented if you use the *vendor integration*.

See *Select Purchase Orders* for background on the pack slip generation process.

Reprint pack slip? The **Reprint Pack Slip** option is available to generate a new pack slip if there are any generated, unshipped pack slips for the purchase order (lines in **In Process** status). You might use this option if the original pack slip is damaged or lost.

Unlike the *Void / Reprint Pack Slip* screen, this option does not provide the ability to reduce the quantity on a purchase order line or void the line by setting the quantity to zero; instead, it just enables you to reprint the pack slip exactly as before, except that a new batch number is assigned.

If there are multiple generated pack slips for the purchase order, each in a different batch, then the *Select Batch* window opens when you select the **Reprint Pack Slip** option; otherwise, the *Reprint Pack Slip* window opens.

If the purchase order includes lines that are in **In Process** status and lines that are in **New Order** status, then the screen displays both the **Generate Pack Slip** option and the **Reprint Pack Slip** option.

A PDF icon ( ) appears at the top of the screen once the pack slip generation is complete. Click this icon to advance to the *View Printed Pack Slips* screen to work with the generated files.

Fields	Description
Purchase Order Information unlabeled area at the top of the screen	
Purchase Order Number	The number or code identifying the purchase order in the originating system.
Date Created	The PO entered date provided by the retailer. Might not be the same as the date when the purchase order became available to you through the Vendor Portal.
Sales Order Number	The number or code identifying the sales order in the originating system.

Fields	Description
Order Status	Possible statuses are: • **Cancelled:** The retailer has cancelled the entire purchase order. • **Complete (multi-line purchase orders only):** The purchase order includes more than one line, and the line statuses include a combination of **Cancelled** and **Shipped**; there are no remaining open lines. • **Held:** You have held the line(s) on the purchase order from processing. You might put a line on hold if you cannot fulfill it, and are requesting that the retailer cancel it. When a line on a purchase order is on hold, it is not eligible for pack slip generation; or, if a pack slip has already been generated, the line is not eligible for shipment confirmation, and if you use the void/reprint option, the held line is omitted from the new pack slip. • **In Process:** You have generated pack slips for the entire purchase order, or the purchase order has been sent to the integrated system (and, if necessary, acknowledged) if you use the *vendor integration*. • **New Order:** You have not yet generated any pack slips for the purchase order, or sent the purchase order to the integrated system if you use the *vendor integration*. If you use the vendor integration and are configured to require acknowledgment, the purchase order might have been sent but not yet acknowledged. • **Open (multi-line purchase orders only):** The purchase order includes more than one line, and the line statuses include at least one line that is **Held**, **In Process**, or **New Order**. • **Shipped:** You have confirmed shipment of the entire purchase order.
Brand	The retailer's brand that is associated with the sales order.
Placed	The code and description of the location originating the sales order. Typically identifies the retailer's distribution center. Separated by a hyphen (-).

Pending address change request? The screen displays a message in red if there is an address change request pending approval for unshipped items. Use the *Purchase Order History Detail* window to review the requested change, or use the *Purchase Order Change Requests* screen to accept or decline the request.

Pending cancellation request? The screen displays a message in red if there is a cancellation request pending approval. Use the *Purchase Order History Detail* window to review the requested change, or use the *Purchase Order Change Requests* screen to accept or decline the request.

> **Note:**
>
> This message is no longer displayed if you confirm shipment of the line without accepting or rejecting the cancellation request.

Header tab: Header summary fields

Fields	Description
Next Due Date	The earliest due date on any of the lines on the purchase order, regardless of whether the earliest due date has passed. No due date is displayed if all items on the purchase order are shipped or canceled.
Ship Via	The code and description identifying the preferred carrier to use for the purchase order. From the first item on the purchase order. Not updated at shipment, even if you specify a different carrier.
Gift	Set to **Y** if the sales order is a gift order; in this case, no prices, charges, or totals print on the pack slip.
Buyer	The code and name of the buyer for the purchase order. Each is included only if provided by the retailer. Separated by a hyphen (-).
Shipping Instructions	The general shipping instructions for the order. There may be additional instructions such as customization instructions, gift messages, or order messages at the *Browse Detail Customizations* window, *Browse Purchase Order Detail Messages* window, and the *Messages tab*.
Ship Complete	Set to **Y** if the purchase order should be shipped in a single shipment. Informational only; does not control pack slip generation.
Total	The purchase order total, including the extended prices of all detail lines. Does not include additional charges, freight, or tax. The currency symbol displayed for the discount amount is based on the *Currency* specified for the purchase order.
Discount	The discount percentage or discount amount specified by the retailer. Separated by a slash (/). The currency symbol displayed for the discount amount is based on the *Currency* specified for the purchase order.
Currency	The code identifying the currency on the sales order. Controls the currency symbol displayed for the purchase order.

Header tab: Address fields
This tab displays summary information about the order and the sold-to and ship-to names and addresses.

Customer data replaced with asterisks? Customer data, including name, company, address, phone numbers, and email addresses, on closed purchase orders can be replaced with asterisks. Often, the retailer purges this data a specified number of days after the purchase order is shipped or canceled.

Fields	Description
Sold To	The customer who placed the sales order. Includes: • name: prefix (such as Mr. or Dr.), first name, middle name, last name, and suffix (such as Jr. or Esq.) • company name • first address line • apartment, unit, or suite number (prefixed by the label **Apt / Unit #:**) • address line 2 • address line 3 • address line 4 • city, state, postal or zip code, country code • daytime phone number (prefixed by the label **Day:**) • evening phone number (prefixed by the label **Eve:**) • email address **Note:** Not all of the information above might be available for each customer. At a minimum, the customer information must include: • first and last name or company • first address line • city, postal or zip code, and country code
Ship To	The customer to receive the line(s) on the purchase order. Includes the same information as the sold-to customer name and address, listed above.
Detail tab This tab displays information about the line(s) on the purchase order, and includes options to display additional information about the line(s).	
Line #	The line number identifying the item on the purchase order.
Item #	Your item number or code. Hold the pointer over the **Item #** to display the retailer’s item number or code and description.
Item Description	A description of the item. Hold the pointer over the **Item Description** to display the retailer’s item number or code and description of the item.
Order Qty	The total quantity of the item ordered by the customer.
Shipped Qty	The total confirmed shipment quantity of the item. You can confirm shipment through the *Purchase Order Shipping* screen or by uploading through the *Purchase Order Shipping Upload* screen.
Printed Qty	The total quantity of the item that you currently have on a generated pack slip or extracted to your system, but not yet confirmed as shipped.

Fields	Description
Cancel Qty	The total quantity of the item that the retailer has cancelled.
Line Status	The current status of the line on the purchase order. Possible statuses are: • **Cancelled:** The retailer has cancelled the line. • **Held:** You have held the line from processing. You might put a line on hold if you cannot fulfill it, and are requesting that the retailer cancel it. When a line on a purchase order is on hold, it is not eligible for pack slip generation; or, if a pack slip has already been generated, the line is not eligible for shipment confirmation, and if you use the void/reprint option, the held line is omitted from the new pack slip. • **In Process:** You have generated a pack slip for the line, or the line has been sent to (and, if necessary, acknowledged by) the integrating system if you use the *vendor integration*. • **New Order:** You have not yet generated a pack slip for the line, or sent the purchase order to (and, if necessary, received acknowledgment from) the integrating system if you use the *vendor integration*. • **Shipped:** You have confirmed shipment of the line. **Note:** The line status is different from the *Order Status* if the purchase order has more than one line, and the lines have different statuses.
Due Date	The current due date for the line. Can differ from the original due date if you entered a revised due date at the *Edit Purchase Order Item* window or the *Purchase Order Maintenance* screen.
Custom	Select the icon ( ) in the **Custom** column to advance to the *Browse Detail Customizations* window, where you can review the special handling instructions for the line. Displayed only if there are special handling instructions.
Messages	Select the icon ( ) in the **Messages** column to advance to the *Browse Purchase Order Detail Messages* window, where you can review any sales order line messages for the line. Displayed only if there is an order line message.

Fields	Description
Display	Select the icon ( ) in the **Display** column to advance to the *Display Purchase Order Item* window, where you can review additional details about the line. **Note:** The link to this window is available only if you have authority to display purchase orders but not to maintain them, or if the line is in Cancelled or Shipped status.
Edit	Select the icon ( ) in the **Edit** column to advance to the *Edit Purchase Order Item* window, where you can review additional details about the line, and optionally put the line on hold or revise the due date. **Note:** The link to this window is available only if you have authority to both display and maintain purchase orders, and if the line is in an **New Order**, **Held**, or **In Process** status.
Invoices tab This tab displays information on any invoices you have created for the items on the purchase order. If you delete an invoice that is in **New** or **Rejected** status, it is no longer displayed at this tab. You cannot delete an invoice in any other status. See *Invoice Inquiry* for more information on invoices.	
Line #	The line number included on the invoice.
Item #	Your item number or code identifying the shipped item included in the invoice. Your description of the item is to the right, separated by a hyphen (**-**).
Invoice Number	The invoice number you specified when creating the invoice.
Invoice Date	The date you specified for the invoice.
Invoice Qty	The total quantity of the item included in the shipment and being billed on this invoice.

Fields	Description
Invoice Unit Cost	The unit cost you are billing the retailer for the shipment. Multiplied by the **Invoice Qty**. **Changing the unit cost?** Optionally, you can use the *Edit Invoice Detail* window to override this unit cost if the invoice is in **New** or **Rejected** status. If the cost you enter exceeds or falls short of the original **PO Unit Cost** by more than the *Unit Cost Threshold* percentage specified by the retailer, the invoice detail line will be out-of-balance. For example, if the retailer sets the threshold at 10%, and you change the invoice unit cost by more than 10%, the invoice detail line is out-of-balance. **Held invoice?** When you submit an invoice that includes any out-of-balance lines, the invoice goes into **Held** status, and the retailer needs to either approve or reject the invoice. If the invoice's status is **Rejected**, you can edit the invoice, including the **Invoice Unit Cost**, again, and resubmit the invoice; or you can delete the invoice.
Display	Optionally, select the display icon ( ) to advance to the *Invoice* screen, where you can review details about the invoice.
History tab This tab displays an entry for each activity that occurs related to a purchase order or a line on the purchase order.	
Line #	The line number updated by the activity. In the case of purchase order creation, there is a history record for each line on the purchase order.
Item (unlabeled field)	The item updated by the activity. In the case of purchase order creation, there is a history record for each item on the purchase order. The description of the item is to the right.
Quantity	The quantity updated by the activity.
Action Type	Possible action types are described below under *Purchase Order History Entries*.
Status	The status of the line after the activity took place. See *Purchase Order History Entries*, below, for details, and see *Line Status*, below, for a list of possible statuses.
Date / Time	The date and time when the activity took place. The date and time might not be your local date and time, if the retailer uses a server in a different time zone. For example, if your store location is on Eastern Standard time, and the retailer uses a server that is on Pacific time, the date and time displayed might be earlier than the current time in your location.
User	The user who performed the activity. A user of Admin is listed for purchase order creation, address update requests, cancellation requests, and cost changes, and updates that take place through the *vendor integration*. Otherwise, this is the user ID of the person who performed the action.

Fields	Description
Source	Indicates where the activity originated: • UI (user interface) = the activity took place at a screen • WS (web service) = the activity originated from the retailer or through the *vendor integration*
Transaction Notes	Additional information about the activity. See *Purchase Order History Entries*, below, for details and examples.
Details	If the retailer has requested an address change, click the details icon ( ) to advance to the *Purchase Order History Detail* window, where you can review the details of a shipping address change, including the address before and after the change. This option is displayed only if the address change was: • submitted when the line was in **New Order** status, before you generated the pack slip, so that the address change applied automatically; or, • submitted when the line was in **In Process** or **Held** status, after you generated the pack slip. In this case, the option is available regardless of whether you accepted or declined the address change. If the retailer requests an address change when the line is in **Shipped** or **Cancelled** status, the Vendor Portal automatically rejects the change, and there is no history record displayed here. **Accept or decline address change?** Use the *Purchase Order Change Requests* screen to accept or decline address change and cancel requests from the retailer.
Messages tab	

> **Note:**
>
> Message lines are consolidated at this tab, but print on separate lines on the pack slip.

Sales Order	This area displays messages related to the sales order originating the purchase order.
Gift Messages	This area displays gift messages related to the sales order.

The following table presents a summary of purchase order history entries.

Action Type	Created When	Source	Status	Transaction Notes
Simple Process Updates				
PO Created	The retailer submits the purchase order to you for fulfillment. A separate history record is created for each line on the purchase order.	WS	New Order	none

Action Type	Created When	Source	Status	Transaction Notes
PackSlip	You use the *Select Purchase Orders* screen to generate pack slips for printing (PDF files) or extract to your system (CSV files).	UI	In Process	Indicates the batch ID that includes the pack slip (for example, Batch ID (74)).
PackSlip	If using the *vendor integration*: the purchase order has been sent to the integrated system.	WS	New Order or In Process	Indicates the batch ID, as above. Status remains **New Order** until the batch of purchase orders is acknowledged, if the *Require Acknowledgement* flag is selected; in this case, a separate history entry indicates when the batch is acknowledged.
Shipment	You confirm shipment through the *Integrated Shipping* screen, the *Purchase Order Shipping* screen, or the *Purchase Order Shipping Upload* screen.	UI	Shipped	Indicates the ship date, carrier code, tracking number, weight, and freight rate, for example: `Ship Date: 07/17/2013, Carrier: 50, Tracking #: Track12155, Weight: 2.34, Rate: $ 1.23`
Shipment	The shipment is confirmed through the *vendor integration*.	WS	Shipped	
Cancellation Requests from the Retailer				
Cancel	The retailer submits a cancellation request for a line in New Order status.	WS	Cancelled	Automatically Cancelled
Cancel	The retailer submits a cancellation request for a line in In Process or Held status.	WS	unchanged	Cancel Requested

Action Type	Created When	Source	Status	Transaction Notes
Cancel	You accept a cancel request at the *Purchase Order Change Requests* screen, or the cancellation applies automatically after the line returned to New Order status after you release a held line at the *Edit Purchase Order Item* window or the *Purchase Order Maintenance* screen, or void (but don't reprint) the pack slip at the *Void / Reprint Pack Slip* screen. See *Purchase Order Shipping* for another example in which a cancellation is approved automatically.	UI	Cancelled	Cancellation Approved
Cancel	You decline a cancel request at the *Purchase Order Change Requests* screen.	UI	unchanged	Cancellation Rejected
Cancel	You confirm shipment of a line with a pending cancellation request.	UI	Shipped	Cancellation Rejected
Cancel Auto Rejected	The retailer sends a cancellation request for a line that is already in Shipped or Canceled status, or if the requested cancel quantity exceeds the current open quantity on the line.	WS	unchanged	Cancel Request Auto Rejected
Address Change Requests from the Retailer				
Address Change	The retailer submits an address change request for a purchase order in New Order status.	WS	New Order	Address Change Automatically Applied
Address Change	The retailer submits an address change request for a purchase order in In Process or Held status.	WS	unchanged	Address Change Requested
Address Change	You ship a purchase order with an outstanding address change request. This message is written only for the first item on the shipment.	UI	Shipped	Address Change Auto Rejected

Action Type	Created When	Source	Status	Transaction Notes
Address Change	You decline an address change at the *Purchase Order Change Requests* screen.	UI	unchanged	Address Change Rejected
Address Change	You accept an address change at the *Purchase Order Change Requests* screen, or the address change applies automatically after the line returned to New Order status after you release a held line at the *Edit Purchase Order Item* window or the *Purchase Order Maintenance* screen, or void (but don't reprint) the pack slip at the *Void / Reprint Pack Slip* screen. See *Purchase Order Shipping* for another example in which a cancellation is approved automatically.	UI	unchanged	Address Change Approved
If the purchase order is in Open status: A purchase order in **Open** status can include lines in **New Order**, **Held**, **Shipped**, **Cancelled**, and **In Process** status. In this situation, each remaining line is treated separately.				
Cost Changes from the Retailer				
Cost Change	The retailer submits a cost change for a line on a purchase order to update the unit price.	WS	unchanged	Before $ 8.98 - After $ 9.98 (where $ 8.98 is the previous unit price, and $ 9.98 is the new unit price) The currency symbol displayed is based on the *Currency* specified for the purchase order.
Additional Changes				
Data Removal	Private data is anonymized.	WS	previous status	PII Data Anonymized
Maintenance	You put a line on hold at the *Edit Purchase Order Item* window or the *Purchase Order Maintenance* screen.	UI	Held	Held: Backordered (where Backordered is the **Reason Description** you entered)

Action Type	Created When	Source	Status	Transaction Notes
Maintenance	You release a line from hold at the *Edit Purchase Order Item* window or the *Purchase Order Maintenance* screen.	UI	previous status	Released The **Reason Description** is not listed here even if you entered one while releasing the line from hold.
Maintenance	You revise the line's Due Date at the *Edit Purchase Order Item* window or the *Purchase Order Maintenance* screen.	UI	unchanged	Maintenance Delay Revised Due Date: 06/28/2013 (where Delay is the Reason Description you entered and 6/28/2013 is the revised due date)
Maintenance	You enter a Reason Description at the *Edit Purchase Order Item* window or the *Purchase Order Maintenance* screen without changing the line's hold status or revising the due date.	UI	unchanged	Maintenance Expected next week (where Expected next week is the Reason Description you entered)
Maintenance	You delete a Reason Description at the *Edit Purchase Order Item* window or the *Purchase Order Maintenance* screen for an line that is not held and does not have a revised due date.	UI	unchanged	Maintenance
Pack Slip Reprinted	You use the *Void / Reprint Pack Slip* screen or the **Reprint Pack Slip** option at the **Purchase Order** screen to void and reprint the pack slip.	UI	In Process	Indicates the new batch ID (for example, Batch ID (74)).
Pack Slip Voided	You use the *Void / Reprint Pack Slip* screen to void but not reprint the pack slip by setting the **New Print Qty** of all printed lines to **0**.	UI	New Order	Indicates the current batch number voided (for example, Batch ID 73)).
Re-opened	You confirm shipment of the entire printed quantity of a line, but there is an additional unprinted quantity because you previously used the *Void / Reprint Pack Slip* screen to reduce the printed quantity.	UI	New Order	

Browse Detail Customizations

Purpose: Use the **Browse Detail Customizations** window to review the special handling instructions for an item on a purchase order. The special handling instructions also print on the pack slip.

How to display this window: Select the icon ( ) in the **Custom** column at the *Detail tab* of the *Purchase Order* screen if you have the required authority.

Field	Description
Line #	The purchase order line number identifying the item to receive the special handling.
Item	The code or number identifying the item receiving the special handling. The description of the item follows, separated by a hyphen (-).
Retailer Item	The retailer's item number or code. The retailer's description of the item follows, separated by a hyphen (-).
Label	The retailer's code identifying the type of special handling instructions, such as monogramming or hemming.
Value	The instructions related to the type of special handling. If the customization message is too wide based on the number of characters and their widths (a **W** being wider than an **i**), the message may be truncated on the window. The customization label and instructions also print on the pack slip. The pack slip can print a wider customization than the **Browse Detail Customizations** window can display; however, if the message is too wide it is truncated on the pack slip as well.

Scroll up or down: Click the next arrow ( ) to display the special handling instructions for the next line on the purchase order. Similarly, click the previous arrow ( ) to display the special handling instructions for the previous line on the purchase order.

If there are no special handling instructions for the next or previous line, the **Label** and **Value** fields displayed are blank.

Browse Purchase Order Detail Messages

Purpose: Use the **Display Purchase Order Detail Messages** window to review a sales order message related to an item on a purchase order.

How to display this window: Select the icon ( ) in the **Messages** column at the *Detail tab* of the *Purchase Order* screen if you have the required authority.

Field	Description
Line #	The purchase order line number identifying the item.
Item	The code or number identifying the item. The description of the item follows, separated by a hyphen (-).

Field	Description
Retailer Item	The retailer's item number or code. The retailer's description of the item follows, separated by a hyphen (-).
Sales Order Line Message	A message related to the item on the sales order.

Scroll up or down: Click the next arrow ( ) to display the sales order message for the next line on the purchase order. Similarly, click the previous arrow ( ) to display the sales order message for the previous line on the purchase order.

If there is no sales order message for the next or previous line, the **Sales Order Line Message** displayed is blank.

Display Purchase Order Item

Purpose: Use the **Display Purchase Order Item** window to review additional details about an item on a purchase order. You advance to this window rather than the *Edit Purchase Order Item* window if:

- the item's status is **Cancelled** or **Shipped**, or
- you do not have authority to edit a purchase order item

How to display this window:

- If you do not have authority to edit a purchase order item, select the icon ( ) in the **Display** column at the *Detail tab* of the *Purchase Order* screen.
- If you have authority to edit a purchase order item, select the icon ( ) in the **Edit** column at the *Detail tab* of the *Purchase Order* screen for an item in Cancelled or Shipped status.

Field	Description
Line #	The purchase order line number identifying the item.
Item	The code or number identifying the item. The description of the item follows, separated by a hyphen (-).
Retailer Item	The retailer's item number or code. The retailer's description of the item follows, separated by a hyphen (-).
Gift Wrap	Set to **Y** if the item requires gift wrap.

Field	Description
Line Status	The current status of the item on the purchase order. Possible statuses are: • **Cancelled:** The retailer has cancelled the line. • **Held:** You have held the line from processing. You might put a line on hold if you cannot fulfill it, and are requesting that the retailer cancel it. When a line on a purchase order is on hold, it is not eligible for pack slip generation; or, if a pack slip has already been generated, the line is not eligible for shipment confirmation, and if you use the void/reprint option, the held line is omitted from the new pack slip. • **In Process:** You have generated a pack slip for the line, or the line has been sent to (and, if necessary, acknowledged by) the integrating system if you use the *vendor integration*. • **New Order:** You have not yet generated a pack slip for the line, or sent the purchase order to (and, if necessary, received acknowledgement from) the integrating system if you use the *vendor integration*. • **Shipped:** You have confirmed shipment of the line. **Note:** The line status is different from the order status if the purchase order has more than one line, and the lines have different statuses. See the *Order Status* for more information.
Original Due Date	The due date that was specified by the retailer for the line.
Revised Due Date	The current due date for the line, if you have entered a different due date. If you have revised the due date more than once, the most recently entered due date is displayed. When you revise the due date, you also need to enter a reason description.
Reason Description	The reason for a change to the line on the purchase order. When you revise the due date, you also need to enter a reason description. You can also enter a reason description when you change a line's hold status, or for any other reason.
Ordered Qty	The original ordered quantity of the line.
Shipped Qty	The total quantity of the line for which you have confirmed shipment.
Cancelled Qty	The total quantity of the line that the retailer has cancelled.
Invoiced Qty	Information will be provided at a later date.
Unit of Measure	The unit of measure indicated by the retailer. Informational only.
Unit Price	Your single-unit price for the item. Rounded to 2 decimal positions (for example, a price of $1.3456 is rounded to $1.35). The currency symbol displayed is based on the *Currency* specified for the purchase order.

Field	Description
Ext. Price	The extended price for the item, calculated by multiplying the Ordered Qty * the Unit Price, regardless of whether any units have been canceled. Rounded to 2 decimal positions. The currency symbol displayed is based on the *Currency* specified for the purchase order.
UPC Code	The item's UPC code, if any, indicated by the retailer.
EAN Code	The item's EAN code, if any, indicated by the retailer.
Status Date	The last date and time when the status of the line changed. The date and time might not be your local date and time, if the retailer uses a server in a different time zone. For example, if your store location is on Eastern Standard time, and the retailer uses a server that is on Pacific time, the date and time displayed might be earlier than the current time in your location.

Option	Procedure
review the next item	Click the next icon ( ) to display the next item.
review the previous item	Click the previous icon ( ) to display the previous item.

Edit Purchase Order Item

Purpose: Use the **Edit Purchase Order Item** window to review additional details about an item on a purchase order and, optionally:

- put the line on hold by selecting the *Hold* flag. When you put a line on hold, you also need to specify a *Reason Description*.

> **Note:**
>
> You might put a line on hold if you cannot fulfill it, and are requesting that the retailer cancel it. When a line on a purchase order is on hold, it is not eligible for pack slip generation or for reprinting through the void/reprint option; or, if a pack slip has already been generated, the line is not eligible for shipment confirmation.

- clear the *Hold* flag to return a line to its previous status. If the line returns to **New Order** status, any pending cancellation request or address change applies automatically. See the *Purchase Order Change Requests* screen for background.
- revise the due date for a line by entering a *Revised Due Date* in the correct format for your locale (as defined at the *Vendor Configuration* screen), or selecting a date from the calendar control next to the Revised Due Date entry field. When you revise the due date for a line, you also need to specify a *Reason Description*.
- enter or delete a *Reason Description* as an informational note about the line, even if you are not changing the line's hold status or revising the due date.

After making any of these changes, click **Save** to save the change and close the window.

All other fields at this window are display-only.

Display window instead? You advance to this window rather than the *Display Purchase Order Item* window if you have the required authority and if the status of the line is not **Shipped** or **Cancelled**.

Retailer notified: The retailer receives a notification email when you hold or release a line, change an expected ship date, or enter or change a *Reason Description*.

How to display this window: Select the icon ( ) in the **Edit** column at the *Detail tab* of the *Purchase Order* screen for a line that is not in **Cancelled** or **Shipped** status if you have the required authority.

Field	Description
Line #	The purchase order line number identifying the item.
Item	The code or number identifying the item. The description of the item follows, separated by a hyphen (-).
Retailer Item	The retailer's item number or code. The retailer's description of the item follows, separated by a hyphen (-).
Gift Wrap	Set to **Y** if the item requires gift wrap.
Line Status	The current status of the line on the purchase order. Possible statuses are: • **Cancelled:** The retailer has cancelled the line. • **Held:** You have held the line from processing. You might put a line on hold if you cannot fulfill it, and are requesting that the retailer cancel it. When a line on a purchase order is on hold, it is not eligible for pack slip generation; or, if a pack slip has already been generated, the line is not eligible for shipment confirmation, and if you use the void/reprint option, the held line is omitted from the new pack slip. • **In Process:** You have generated a pack slip for the line, or the line has been sent to (and, if necessary, acknowledged by) the integrating system if you use the *vendor integration*. • **New Order:** You have not yet generated a pack slip for the line, or sent the purchase order to (and, if necessary, received acknowledgement from) the integrating system if you use the *vendor integration*. • **Shipped:** You have confirmed shipment of the line. **Note:** The line status is different from the *Order Status* if the purchase order has more than one line, and the lines have different statuses. See the *Order Status* for more information.
Original Due Date	The due date that was specified by the retailer for the line.

Field	Description
Hold	Optionally, select this flag to change the line's status to **Held**, or clear the flag to release the line from hold and change the status back to the previous setting. You might put a line on hold if you cannot fulfill it, and are requesting that the retailer cancel it. When a line on a purchase order is on hold, it is not eligible for pack slip generation; or, if a pack slip has already been generated, the line is not eligible for shipment confirmation, and if you use the void/reprint option, the held line is omitted from the new pack slip. When you put a line on hold, you need to enter a *Reason Description*. If you release the line from hold and it returns to **New Order** status, any pending cancellation request or address change applies automatically. See the *Purchase Order Change Requests* screen for background. **Retailer notified:** The retailer receives a notification email when you hold or release a line.
Revised Due Date	Optionally, enter a different due date in the correct format for your locale (as defined at the *Vendor Configuration* screen) or select a date from the calendar control. When you revise the due date, you also need to enter a *Reason Description*. **Retailer notified:** The retailer receives a notification email when you change an expected ship date.
Reason Description	Enter a reason description: • when you enter a **Revised Due Date** (required), or • when you change the setting of the **Hold** flag (required), or • to enter an information note for the line (optional) When the line's status is **Held** and you clear the **Hold** flag, the **Reason Description** is also cleared. **Retailer notified:** The retailer receives a notification email when you enter or change a reason description.
Ordered Qty	The original ordered quantity of the item.
Shipped Qty	The total quantity of the item for which you have confirmed shipment.
Cancelled Qty	The total quantity of the item that the retailer has cancelled.
Invoiced Qty	The total quantity of the item that is included on an invoice, regardless of the status of the invoice. The Vendor Portal reduces this quantity if you delete the invoice including the item (only **New** or **Rejected** invoices are eligible for deletion).
Unit of Measure	The unit of measure indicated by the retailer. Informational only.
Unit Price	Your single-unit price for the item. Rounded to 2 decimal positions (for example, a price of $1.3456 is rounded to $1.35). The currency symbol displayed is based on the *Currency* specified for the purchase order.
Ext. Price	The extended price for the item, calculated by multiplying the Ordered Qty * the Unit Price, regardless of whether any units have been canceled. Rounded to 2 decimal positions. The currency symbol displayed is based on the *Currency* specified for the purchase order.
UPC Code	The item's UPC code, if any, indicated by the retailer.
EAN Code	The item's EAN code, if any, indicated by the retailer.

Field	Description
Status Date	The last date and time when the status of the line changed. The date and time might not be your local date and time, if the retailer uses a server in a different time zone. For example, if your store location is on Eastern Standard time, and the retailer uses a server that is on Pacific time, the date and time displayed might be earlier than the current time in your location.

Option	Procedure
put the line on hold	• Select the *Hold* flag. • Enter a *Reason Description*. • Click **Save**. The line's status changes to **Held**, and it is no longer eligible for pack slip generation or shipment.
remove the line from hold	• Clear the *Hold* flag. • Optionally, enter a different *Reason Description*. • Click **Save**. The line's status changes to its prior status, and the *Reason Description* is cleared. The line is now eligible for pack slip generation (if the status is **New Order**) or shipment (if the status is **In Process**).
revise the due date	• Select a different due date from the calendar control. • Enter a *Reason Description*. • Click **Save**.
enter a reason description without putting the line on hold or revising the due date	• Enter a *Reason Description*. • Click **Save**.
change the current reason description	• Type over the current *Reason Description*. • Click **Save**.
clear the reason description	• Delete the current *Reason Description*. • Click **Save**.
review the next item	Click the next icon () to display the next item.
review the previous item	Click the previous icon () to display the previous item.

Purchase Order History Detail

Purpose: Use the **Purchase Order History Detail** window to review:

- an address change applied automatically to a line because the retailer submitted the change when the line was in **New Order** status
- an address change requested by the retailer when a line is in **In Process** or **Held** status; these address changes do not apply until you accept them at the *Purchase Order Change Requests* screen

Automatically rejected? Address change requests are not available for review in this window if they arrive when the line is already in **Cancelled** or **Shipped** status. These address change requests are automatically rejected.

How to accept or reject: Use the *Purchase Order Change Requests* screen.

Address changes for different lines on the purchase order: Even though the address change request is related to the purchase order header, the Vendor Portal evaluates the status of the individual lines on the purchase order when determining whether to apply the change, reject it automatically, or submit it to you for review.

Example: A purchase order is in **Open** status, with one line in **In Process** status and one line in **Shipped** status. You need to approve or reject the address change for the line in **In Process** status. The address change is automatically rejected for the line in **Shipped** status.

What if the retailer submits multiple address changes for the same line? If the retailer submits a second or third address change for the same **In Process** or **Held** line before you have accepted or rejected the previously rejected change, the Vendor Portal automatically rejects the previous address change. In this situation, when you display the **Purchase Order History Detail** window, only the name and address information for the most recent address change is displayed.

If the retailer submits multiple address changes for a **New Order** line before you generate the pack slip, each address change is automatically applied, and is displayed at the **Purchase Order History Detail** window.

How to display this window: Select the icon ( ) in the **Details** column at the *History tab* of the *Purchase Order* screen if you have the required authority. This icon is displayed only if there is an address change request that was received when the line was in **New Order**, **In Process**, or **Held** status.

Window displayed for multiple history records? If the address change was:

- **accepted** = The window is available next to the history record marking both when the address change was requested and when you approved the address change. The status indicated in both windows is **Address Change Approved**.
- **rejected** = The window is available only next to the history record marking when the address change was requested. The status indicated is **Address Change Rejected**.

Field	Description
Action Type	Always set to **Address Change**.
Date / Time	The date and time when the address change request was received. The date and time might not be your local date and time, if the retailer uses a server in a different time zone. For example, if your store location is on Eastern Standard time, and the retailer uses a server that is on Pacific time, the date and time displayed might be earlier than the current time in your location.

Field	Description
Status	The current status of the address change (not the status at the time the history record was created). Possible statuses are: • **Address Change Requested** = The retailer has submitted an address change, the line is in **Held** or **In Process** status, and you have not yet accepted or rejected the change. • **Address Change Automatically Applied** = The Vendor Portal applied the address change automatically because the purchase order was in **New Order** status and you had not yet generated a pack slip. • **Address Change Approved** = You have accepted the address change for a **Held** or **In Process** line at the *Purchase Order Change Requests* screen. This status is displayed in this window for both the original history record created when the retailer requested the change, and the history record created when you accepted the change. • **Address Change Rejected** = You have rejected the address change for a **Held** or **In Process** line at the *Purchase Order Change Requests* screen. This status is displayed in this window for both the original history record created when the retailer requested the change, and the history record created when you rejected the change.
User	The user ID of the person who performed the activity: • **Admin:** indicated when: the retailer requests an address change an address change is automatically applied to a **New Order** line an address change is automatically rejected when you confirm shipment • a vendor user ID: indicated when you accept or reject an address change at the *Purchase Order Change Requests* screen
Sold To Change	Indicates whether the sold-to address for the purchase order is the same as the shipping address, so the retailer is requesting that both addresses be changed. Possible settings: • **Yes** = update both the sold-to address and the ship-to address • **No** = update the ship-to address only
Source	Indicates where the activity originated. Possible settings: • **WS** (web service) = the retailer submitted the request through a message from the retailer's system to the Vendor Portal, or the change is automatically applied or rejected • **UI** (user interface) = you accepted or rejected the change at the *Purchase Order Change Requests* screen

Field	Description
Old Ship To	The ship-to name and address before applying the change. Includes: • name: prefix (such as Mr. or Dr.), first name, middle name, last name, and suffix (such as Jr. or Esq.) • company name • first address line • apartment, unit, or suite number (prefixed by the label **Apt / Unit #:**) • address line 2 • address line 3 • address line 4 • city, state, postal or zip code, country code • daytime phone number (prefixed by the label **Day:**) • evening phone number (prefixed by the label **Eve:**) • email address **Note:** Not all of the information above might be available for each customer.
New Ship To	The ship-to name and address with the changes indicated in red. Includes the same name and address fields as the **Old Ship To**.

Reprint Pack Slip

Purpose: Use this window to confirm the voiding and reprinting of a printed pack slip.

For more information: See the *Void / Reprint Pack Slip* screen or the *Purchase Order* screen.

How to display this screen: Click **Reprint Pack Slip** at the *Purchase Order* screen. This option is available to generate a new pack slip if there are any generated, unshipped pack slips for the purchase order (lines in **In Process** status). You might use this option if the original pack slip is damaged or lost.

> **Note:**
>
> If there are multiple generated pack slips for the purchase order, each in a different batch, then the *Select Batch* window opens when you select the **Reprint Pack Slip** option from the *Purchase Order* screen.

Completing this window: When you click **Accept** at this window, the Vendor Portal generates a new pack slip with the same information as the original pack slip.

Pack slip icon: The Vendor Portal displays the pack slip icon at the top of the screen when it has finished regenerating the pack slip. Click that icon to advance to the *View Printed Pack Slips* screen, where you can review and print the regenerated pack slip.

Void / Reprint Pack Slip

Purpose: Use the **Void / Reprint Pack Slip** screen to reprint pack slips when needed, for example if:

- the original pack slip is damaged or missing
- the retailer has submitted an address change since you printed the original pack slip
- the retailer has submitted a cancellation request since you printed the original pack slip
- you do not have the full ordered quantity of all purchase order lines available for shipping, so you need a new pack slip with just the available lines and quantities

You can also use this screen to void an entire pack slip if you cannot ship it. Voiding the entire pack slip acts as an automatic acceptance of any pending cancellation requests or pending address change.

Dependent on configuration: The *Vendor Configuration* settings specify whether to generate a PDF pack slip, a PDF pullsheet, and a CSV file when you generate pack slips. Also, the configuration settings whether to generate the graphical or non-graphical version of the pack slip.

Pending change requests? If the retailer has submitted any pending address change or cancellation requests, the screen displays a message: Change Requests waiting approval exist. To prevent unexpected results, you need to use the *Purchase Order Change Requests* screen to accept or decline any pending address change or cancellation requests for the purchase order before voiding and reprinting the pack slip. For example, if there is a pending address change, you need to accept the address change before reprinting the pack slip so that the new pack slip lists the correct mailing address.

How to display this screen: Select **Void / Reprint Pack Slip** from the *Home Screen* or the **Purchase Orders** drop-down menu if you have the required authority.

Option	Procedure
select a purchase order and display information about the pack slip to void and reprint	Enter the purchase order number in the *PO Number* field and click **Search** or press **Enter**. If the number you enter: • identifies an existing purchase order with: one or more **In Process** lines on a single pack slip, the screen displays the purchase order information. one or more **In Process** lines on multiple pack slips, the *Select Batch* window opens. If you are not sure of the batch ID for the pack slip, select a batch at the window and click **Save** to return to the screen with the item(s) from that pack slip displayed. If the selected batch does not include the correct item(s), click **Search** to open the **Select Batch** window again so you can select a different batch. • does not identify an existing purchase order with at least one **In Process** line, the screen indicates that there is no match to your entry. **Case:** The purchase order number is not case-sensitive for searching; an entry of `A` or `a` matches a purchase order number of `A12345`.

Option	Procedure
Pending change requests? If the retailer has submitted any pending address change or cancellation requests, the screen displays a message: Change Requests waiting approval exist. To prevent unexpected results, you need to either use the *Purchase Order Change Requests* screen to accept or decline any pending address change or cancellation requests for the purchase order before reprinting the pack slip, or fully void the pack slip and then reprint. If you simple reprint the pack slip, the address change or cancellation does not apply.	
reprint a packing slip with one or more lines omitted	• After specifying the purchase order, use the *New Print Qty* field to change the quantity on the pack slip to **0**. **Note:** If the *New Print Qty* field for a line displays the word **Held**, then the line is automatically omitted from the reprinted pack slip. • Click **Void / Reprint** to open the *Void / Reprint Pack Slip Confirmation* window. • Click **Accept** at the *Void / Reprint Pack Slip Confirmation* window to generate the new pack slip: You advance to the *View Printed Pack Slips* screen, which indicates the batch number assigned to the reprinted pack slip. When pack slip generation is complete, you can view the new pack slip, pullsheet, and CSV file, based on the Pack Slip output specified at the *Vendor Configuration* screen. The *Pack Slip*, *Pack Slip CSV File*, and *Pack Slip Batch Pullsheet* each include just the purchase order lines whose *New Print Qty* was not **0** and which are not held. See each of the above documents for more details. The Vendor Portal changes the **Printed Qty** to **0** for any lines whose *New Print Qty* was set to **0**, and changes the status of these lines to **New Order** unless a pending cancellation request applied automatically. If a line was held, the **Printed Qty** changes to **0** but the status remains **Held**. See the *Detail tab* at the *Purchase Order* screen for more information. The lines on the new pack slip are assigned to the new batch number indicated at the *View Printed Pack Slips* screen. Lines omitted from the pack slip because their *New Print Qty* is set to **0** no longer have a batch assigned. The Vendor Portal writes history for each purchase order line on the original pack slip, indicating whether the pack slip was reprinted (if the *New Print Qty* was not **0**) or voided (if the *New Print Qty* was **0** or the line was held). See the *History tab* at the *Purchase Order* screen for more information.

Option	Procedure
reprint a packing slip with the quantity of one or more lines reduced	• After selecting the purchase order, use the *New Print Qty* field to change the quantity of an item on the pack slip. • Click **Void** / **Reprint** to open the Void / Reprint Pack Slip Confirmation window. • Click **Accept** at the Void / Reprint Pack Slip Confirmation window to generate the new pack slip: You advance to the View Printed Pack Slips screen, which indicates the batch number assigned to the reprinted pack slip. When pack slip generation is complete, you can view the new pack slip, pullsheet, and CSV file, based on the Pack Slip output specified at the Vendor Configuration screen. The Pack Slip, Pack Slip CSV File, and Pack Slip Batch Pullsheet each include the current printed quantity of each purchase order line based on the *New Print Qty*. See each of the above documents for more details. The Vendor Portal changes the **Printed Qty** for any lines whose *New Print Qty* was reduced; however, the status of these lines remains **In Process**. See the *Detail tab* at the Purchase Order screen for more information. The lines on the new pack slip are assigned to the new batch number indicated at the View Printed Pack Slips screen. The Vendor Portal writes history for each purchase order line indicating that the pack slip was reprinted. See the History tab at the Purchase Order screen for more information. **Note:** If a partial quantity of a line is printed, you cannot generate another pack slip for the remaining, unprinted quantity until you confirm shipment of the printed quantity, or void the pack slip. **Held line?** If you have used the Purchase Order Maintenance screen or the Edit Purchase Order Item window to put a purchase order line on hold, then you cannot enter a new print quantity; instead, this field lists the word **Held**. If you reprint the pack slip, the held line is omitted from the pack slip and the **Printed Qty** for the line is set to **0**.

<table>
<tr><th>Option</th><th>Procedure</th></tr>
<tr><td>void an entire pack slip</td><td>After specifying the purchase order, use the New Print Qty field to change the New Print Qty of each item on the pack slip to 0 unless the line is held.
Click Void / Reprint to open the Void / Reprint Pack Slip Confirmation window.
Click Accept at the Void / Reprint Pack Slip Confirmation window to void the pack slip:
The Vendor Portal changes the Printed Qty to 0 for all lines on the pack slip, and changes the status of these lines to New Order unless a pending cancellation request applied automatically or the line was already held. See the Detail tab at the Purchase Order screen for more information.

The batch is cleared from the lines on the pack slip, and no new batch number is assigned.

Any pending address changes or cancellation requests are applied.

The Vendor Portal writes history for each purchase order line on the original pack slip, indicating that the line was voided. See the History tab at the Purchase Order screen for more information.</td></tr>
<tr><td>generate a new pack slip without changing the quantities for any purchase order lines</td><td>Pending change requests? If the retailer has submitted any pending address change or cancellation requests, the screen displays a message: Change Requests waiting approval exist. To prevent unexpected results, you need to use the Purchase Order Change Requests screen to accept or decline any pending address change or cancellation requests for the purchase order before voiding and reprinting the pack slip. For example, if there is a pending address change, you need to accept the address change before reprinting the pack slip so that the new pack slip lists the correct mailing address.
After specifying the purchase order, click Void / Reprint to open the Void / Reprint Pack Slip Confirmation window.
Click Accept at the Void / Reprint Pack Slip Confirmation window to generate the new pack slip:
You advance to the View Printed Pack Slips screen, which indicates the batch number assigned to the reprinted pack slip. When pack slip generation is complete, you can view the new pack slip, pullsheet, and CSV file, based on the Pack Slip output specified at the Vendor Configuration screen.

The lines on the new pack slip are assigned to the new batch number indicated at the View Printed Pack Slips screen.

The Vendor Portal writes history for each purchase order line indicating that the pack slip was reprinted. See the History tab at the Purchase Order screen for more information.

Held line? If you have used the Purchase Order Maintenance screen or the Edit Purchase Order Item window to put a purchase order line on hold, then you cannot enter a new print quantity; instead, this field lists the word Held. If you reprint the pack slip, the held line is omitted from the pack slip and the Printed Qty for the line is set to 0.</td></tr>
</table>

Fields	Description
Search fields	
PO #	The number or code identifying the purchase order in the originating system. Enter a purchase order number with at least one **In Process** pack slip and click **Search** or press **Enter** to: • display the information from the pack slip, if there is a single **In Process** pack slip for the purchase order • open the *Select Batch* window if there is more than one **In Process** pack slip for the purchase order Not case-sensitive for searching; an entry of `A` or `a` matches a purchase order number of `A12345`.
PO HEADER fields All PO Header fields are display-only.	
Ship To	The current shipping address for the pack slip. Can include: • name: prefix, first name, middle initial or name, last name, suffix • company name • first street address line • apartment or suite, prefixed by **Apt / Unit #** • second through fourth address lines • city, state, zip or postal code, country code
PO Number	The purchase order number you entered in the *PO #* field. This is the number or code identifying the purchase order in the originating system.
Date Created	The PO entered date provided by the retailer. Might not be the same as the date when the purchase order became available to you through the Vendor Portal.
Order Number	The number or code identifying the sales order in the originating system.
Status	Possible statuses are: • **In Process:** You have generated pack slips for the entire purchase order. • **Open (multi-line purchase orders only):** The purchase order includes more than one line, and the line statuses include at least one line that is **Held**, **In Process**, or **New Order**.
Brand	The retailer's brand that is associated with the sales orders originating the purchase order.
Batch ID	The number assigned by the Vendor Portal to identify a group of pack slips generated at the same time. A batch can include a single pack slip. Batch numbers are not necessarily sequential.
Search Results fields All fields except the *New Print Qty* are display-only.	
Line #	The line number identifying the item on the purchase order.
Item #	Your item number or code. Hold the pointer over the **Item #** to display the retailer's item number or code and description.

Fields	Description
Item Description	A description of the item. Hold the pointer over the **Item Description** to display the retailer's item number or code and description of the item.
Order Qty	The total quantity of the item ordered by the customer.
Printed Qty	The total quantity of the item that you currently have on a generated pack slip or extracted to your system, but not yet confirmed as shipped.
New Print Qty	The printed quantity to list on the reprinted pack slip. Defaults to the current printed quantity on the pack slip. Optionally, you can enter a lower number to reduce the quantity for the reprinted pack slip, or change the quantity to 0 to omit the item from the pack slip and reset the printed quantity on the line to 0. **Held:** If you have used the *Purchase Order Maintenance* screen or the *Edit Purchase Order Item* window to put a purchase order line on hold, then you cannot enter a new print quantity; instead, this field lists the word **Held**. If you reprint the pack slip, the held line is omitted from the pack slip and the **Printed Qty** for the line is set to **0**.

Select Batch

Purpose: Use this window to select the batch containing the pack slip you want to:

- regenerate, if you are using the *Void / Reprint Pack Slip* screen.
- confirm for shipment, if you are using the *Integrated Shipping* screen.

This window opens only when the lines on a purchase order selected are across more than one batch.

When would a purchase order print in more than one batch? Typically, a purchase order would have pack slips in more than one batch if you:

- put one or more purchase order lines on hold
- generate a pack slip for the purchase order; the Vendor Portal assigns the pack slip to a batch
- release one or more purchase order lines from hold
- generate another pack slip for the purchase order; the Vendor Portal assigns the pack slip to a different batch

For more information: See the *Purchase Order Maintenance* screen for background on changing the hold status for a purchase order line. You can also use the *Edit Purchase Order Item* window to change the hold status of a line.

How to determine the correct batch? If you are not sure of which item(s) are included in which batch:

- From the *Void / Reprint Pack Slip* screen or the *Integrated Shipping*screen: You can select the first batch from this window and click **Save** to return to the screen with the item(s) from that pack slip displayed. If the selected batch does not include the correct item(s), click **Search** again at the original screen to open the **Select Batch** window again so you can select a different batch.

- From the *Purchase Order* screen: Use the History tabto review the batch number assigned to each line.

How to display this screen:

- Click **Search** with a purchase order selected at the *Void / Reprint Pack Slip* screen, or
- Click **Search** with a purchase order selected at the *Integrated Shipping* screen, or
- Click **Reprint Pack Slip** at the *Purchase Order* screen.

Completing this window:

- Select the correct number from the **Batch ID** dropdown list.
- Click **Save** to return to the *Void / Reprint Pack Slip* or *Integrated Shipping* screen with the information from the selected batch displayed. If the information is not the correct pack slip, click **Search** again at the Void/Reprint Pack Slip or Integrated Shipping screen to reopen the **Select Batch** window and select a different batch.

Void / Reprint Pack Slip Confirmation

Purpose: Use this window to confirm the voiding and reprinting of a printed pack slip.

For more information: See the *Void / Reprint Pack Slip* screen or the *Purchase Order* screen.

How to display this screen:

- Click **Void / Reprint** at the *Void / Reprint Pack Slip* screen, or
- Click **Reprint Pack Slip** at the *Purchase Order* screen. **Note:** If the selected purchase order includes more than one batch, you need to first use the *Select Batch* window to select a batch, and then click **Save**.

Completing this window: When you click **Accept** at this window, if you have:

- Changed the printed quantity of all lines to 0, voiding the entire pack slip (available from the *Void / Reprint Pack Slip* screen only):

The Vendor Portal changes the **Printed Qty** to **0** for all lines on the pack slip, and changes the status of these lines to **New Order** unless a pending cancellation request applied automatically or the line was already held. See the *Detail tab* at the *Purchase Order* screen for more information.

The batch is cleared from the lines on the pack slip, and no new batch number is assigned.

Since the lines' status is set to **New Order**, any pending address changes or cancellation requests are applied.

The Vendor Portal writes history for each purchase order line on the original pack slip, indicating that the line was voided. See the *History tab* at the *Purchase Order* screen for more information.

- Changed the printed quantity of any lines to 0 without voiding the entire pack slip (available from the *Void / Reprint Pack Slip* screen only):

The Vendor Portal displays the pack slip icon at the top of the screen when it has finished generating the pack slip. Click that icon to advance to the *View Printed Pack Slips* screen, where you can view the new pack slip, pullsheet, and CSV file, based on the Pack Slip output specified at the *Vendor Configuration* screen.

The *Pack Slip*, *Pack Slip CSV File*, and *Pack Slip Batch Pullsheet* each include just the purchase order lines whose *New Print Qty* was not **0** and which are not held. See each of the above documents for more details.

The Vendor Portal changes the **Printed Qty** to **0** for any lines whose *New Print Qty* was set to **0**, and changes the status of these lines to **New Order** unless a pending cancellation request applied automatically. If a line was held, the **Printed Qty** changes to **0** but the status remains **Held**. See the *Detail tab* at the *Purchase Order* screen for more information.

The lines on the new pack slip are assigned to the new batch number indicated at the *View Printed Pack Slips* screen. Lines omitted from the pack slip no longer have a batch assigned.

The Vendor Portal writes history for each purchase order line on the original pack slip, indicating whether the pack slip was reprinted (if the *New Print Qty* was not **0**) or voided (if the *New Print Qty* was **0** or the line was held). See the *History tab* at the *Purchase Order* screen for more information.

- Reduced the printed quantity of one or more lines (available from the *Void / Reprint Pack Slip* screen only):

The Vendor Portal displays the pack slip icon at the top of the screen when it has finished generating the pack slip. Click that icon to advance to the *View Printed Pack Slips* screen, where you can view the new pack slip, pullsheet, and CSV file, based on the Pack Slip output specified at the *Vendor Configuration* screen.

The *Pack Slip*, *Pack Slip CSV File*, and *Pack Slip Batch Pullsheet* each include the current printed quantity of each purchase order line based on the *New Print Qty*. See each of the above documents for more details.

The Vendor Portal changes the **Printed Qty** for any lines whose *New Print Qty* was reduced; however, the status of these lines remains **In Process**. See the *Detail tab* at the *Purchase Order* screen for more information.

The lines on the new pack slip are assigned to the new batch number indicated at the *View Printed Pack Slips* screen.

The Vendor Portal writes history for each purchase order line indicating that the pack slip was reprinted. See the *History tab* at the *Purchase Order* screen for more information.

Note: If a partial quantity of a line is printed, you cannot generate another pack slip for the remaining, unprinted quantity until you confirm shipment of the printed quantity, or void the pack slip.

Held line? If you have used the *Purchase Order Maintenance* screen or the *Edit Purchase Order Item* window to put a purchase order line on hold, then you cannot enter a new print quantity; instead, this field lists the word **Held**. If you reprint the pack slip, the held line is omitted from the pack slip and the **Printed Qty** for the line is set to **0**.

- Reprinted the pack slip without making any changes:

The Vendor Portal displays the pack slip icon at the top of the screen when it has finished generating the pack slip. Click that icon to advance to the *View Printed Pack Slips* screen, where you can view the new pack slip, pullsheet, and CSV file, based on the Pack Slip output specified at the *Vendor Configuration* screen.

The lines on the new pack slip are assigned to the new batch number indicated at the *View Printed Pack Slips* screen.

The Vendor Portal writes history for each purchase order line indicating that the pack slip was reprinted. See the *History tab* at the *Purchase Order* screen for more information.

Held line? If you have used the *Purchase Order Maintenance* screen or the *Edit Purchase Order Item* window to put a purchase order line on hold, then you cannot enter a new print quantity; instead, this field lists the word **Held**. If you reprint the pack slip, the held line is omitted from the pack slip and the **Printed Qty** for the line is set to **0**.

Purchase Order Maintenance

Purpose: Use the **Purchase Order Maintenance** screen to:

- put the line on hold by selecting the *Hold* flag. When you put a line on hold, you also need to specify a Reason *Description*. When you release a line from hold, you can enter a different reason description or leave the field blank.

> **Note:**
>
> You might put a line on hold if you cannot fulfill it, and are requesting that the retailer cancel it. When a line on a purchase order is on hold, it is not eligible for pack slip generation; or, if a pack slip has already been generated, the line is not eligible for shipment confirmation, and if you use the void/reprint option, the held line is omitted from the new pack slip.

- clear the *Hold* flag to return the line to its previous status. If the line returns to **New Order** status, any pending cancellation request or address change applies automatically. See the *Purchase Order Change Requests* screen for background.
- revise the due date for a line by entering a *Revised Due Date* in the correct format for your locale (as defined at the *Vendor Configuration* screen), or selecting a date from the calendar control next to the **Revised Due Date** entry field. When you revise the due date for a line, you also need to specify a *Reason Description*.
- enter or delete a *Reason Description* as an informational note about the line, even if you are not changing the line's hold status or revising the due date.

After entering your changes, click **Update** to update one or more lines on a purchase order, or click **Cancel** to cancel your updates.

Retailer notified: The retailer receives a notification email when you hold or release a line, change a due date, or enter or change a *Reason Description*.

All other fields at this screen are display-only.

How to display this screen: Select **Purchase Order Maintenance** from the *Home Screen* or the **Purchase Orders** drop-down menu if you have the required authority.

Fields	Description
Search fields **Searching for lines to maintain:** When you first advance to this screen, no lines on purchase orders are displayed. Use any combination of the following fields and click **Search** to restrict the lines displayed to those matching your search criteria. Up to 500 purchase order lines are displayed in ascending order (oldest to newest) based on the date and time when they were sent to the Vendor Portal.	
Line Status	Select a status from the drop-down list and click **Search** to restrict displayed lines to those in the selected status. Possible statuses are: • **Held:** You have held the line from processing. You might put a line on hold if you cannot fulfill it, and are requesting that the retailer cancel it. When a line on a purchase order is on hold, it is not eligible for pack slip generation; or, if a pack slip has already been generated, the line is not eligible for shipment confirmation, and if you use the void/reprint option, the held line is omitted from the new pack slip. • **In Process:** You have generated a pack slip for the line, or the line has been sent to (and, if necessary, acknowledged by) the integrating system if you use the *vendor integration*. • **New Order:** You have not yet generated a pack slip for the line, or sent the purchase order to (and, if necessary, received acknowledgement from) the integrating system if you use the *vendor integration*. **Note:** Shipped or canceled lines are not eligible for maintenance.
PO Number	Optionally, enter a full or partial number or code identifying the purchase order in the originating system to display purchase orders that start with or match your entry. Can include numbers, letters, spaces, or special characters. Up to 30 positions. Not case-sensitive for searching; an entry of `A` or `a` matches an purchase order number of `A12345`.
Order Number	Optionally, enter a full or partial number or code identifying the sales order in the originating system to display purchase orders whose sales order number starts with your entry. Up to 30 positions. Not case-sensitive for searching; an entry of `A` or `a` matches an order number of `A12345`.

Fields	Description
Item #	Your item number or code. Optionally, enter a full or partial item code to display purchase orders or lines if the items start with or match your entry. For example, if you sell items ABC111 and ABC123, entering ABC1 matches both of these items. Up to 35 positions. Not case-sensitive for searching; an entry of `A` or `a` matches an item number of `A12345`.
Retailer Item #	The retailer's item number or code. Optionally, enter a full or partial item code to display purchase orders or lines if the retailer's item codes start with or match your entry. For example, if the retailer has item codes XYZ222 and XYZ234, entering XYZ2 matches both of these retailer items. Up to 35 positions. Not case-sensitive for searching; an entry of `A` or `a` matches a retailer item number of `A12345`.
Due Date	Optionally, select a date from the calendar control or enter it in the correct format for your locale (as defined at the *Vendor Configuration* screen) to display lines whose revised due dates, if any, match your entry; otherwise, to display lines whose original due dates match your entry. **Note:** If a line has a revised due date, searching based on the original due date does not display the line. To display the line, you need to search based on the revised date.

Result fields
Up to 500 purchase order lines are displayed in ascending order (oldest to newest) based on the date and time when they were sent to the Vendor Portal.

PO Number	The number or code identifying the purchase order in the originating system.
Order Number	The number or code identifying the sales order in the originating system.
Item #	Your item number or code. Hold the pointer over the **Item #** to display a description of the item.
Retailer Item #	The retailer's item number or code. Hold the pointer over the **Retailer Item #** to display the retailer's description of the item.
Original Due Date	The due date that was specified by the retailer for the line.

Maintaining a line on a purchase order: Optionally, use the following three fields and click **Update** to update one or more lines on a purchase order, or click **Cancel** to cancel your updates.

Fields	Description
Hold	Optionally, select this flag to change the line's status to **Held**, or clear the flag to release the line from hold and change the status back to the previous setting. You might put a line on hold if you cannot fulfill it, and are requesting that the retailer cancel it. When a line on a purchase order is on hold, it is not eligible for pack slip generation; or, if a pack slip has already been generated, the line is not eligible for shipment confirmation, and if you use the void/reprint option, the held line is omitted from the new pack slip. When you put a line on hold, you need to enter a *Reason Description*. If you release the line from hold and it returns to **New Order** status, any pending cancellation request or address change applies automatically. See the *Purchase Order Change Requests* screen for background. **Retailer notified:** The retailer receives a notification email when you hold or release a line.
Revised Due Date	Optionally, enter a different due date in the correct format for your locale (as defined at the *Vendor Configuration* screen), or select a date from the calendar control. When you revise the due date, you also need to enter a *Reason Description*. **Retailer notified:** The retailer receives a notification email when you change a due date.
Reason Description	Enter a reason description: • when you enter or change a **Revised Due Date** (required), or • when you change the setting of the **Hold** flag (required), or • to enter an informational note for the line (optional) When the line's status is **Held** and you clear the **Hold** flag, the **Reason Description** is also cleared. Optionally, you can enter a different **Reason Description** when you release the line. **Retailer notified:** The retailer receives a notification email when you enter or change a *Reason Description*.

Fields	Description
Line Status	Possible statuses are: • **Held:** You have held the line from processing. You might put a line on hold if you cannot fulfill it, and are requesting that the retailer cancel it. When a line on a purchase order is on hold, it is not eligible for pack slip generation; or, if a pack slip has already been generated, the line is not eligible for shipment confirmation, and if you use the void/reprint option, the held line is omitted from the new pack slip. • **In Process:** You have generated a pack slip for the line, or the line has been sent to (and, if necessary, acknowledged by) the integrating system if you use the *vendor integration*. • **New Order:** You have not yet generated a pack slip for the line, or sent the purchase order to (and, if necessary, received acknowledgement from) the integrating system if you use the *vendor integration*. **Note:** Shipped or canceled lines are not displayed at this screen.
PO Inquiry	Click the PO Inquiry icon ( ) to advance to the *Purchase Order Inquiry* screen, where you can review the details of the purchase order, such as the sold-to and ship-to address, items, history, and messages.

Select Purchase Orders

Purpose: Use this screen to generate pack slips for purchase orders assigned to you for fulfillment.

Generation options: The configuration options set by the retailer control whether this screen generates the PDF *Pack Slip*, the PDF *Pack Slip Batch Pullsheet*, a *Pack Slip CSV File* (comma-separated value) of the purchase orders for extract to your system, or all of these.

How to display this screen: Select **Select Purchase Orders** from the *Home Screen* or the **Purchase Orders** drop-down menu if you have the required authority.

If integrated: If you use the *vendor integration*, this screen is not available; the *Get Purchase Orders* screen is available instead.

Which purchase orders are eligible? Only purchase orders or purchase order lines in **New Order** status are eligible for pack slip generation.

About CSV files: You can open a CSV file in your default spreadsheet application, such as Microsoft Excel. You can also extract the contents of the CSV file into your database if your system supports it.

Selection options: When generating pack slips, you can select:

- **All POs:** Generates pack slips without the requirement to select individual purchase orders; however, you can:
  - specify a maximum number of purchase orders to select
  - restrict pack slip generation to:
  - single-line purchase orders
  - a particular brand
  - shipping addresses in a particular country and, optionally, state/province or territory
  - purchase orders that include lines whose due date is on or before a specified date
- **Select POs:** Generates the pack slips for the purchase orders you select at the screen. You can restrict the displayed purchase orders available for selection based on:
  - single-line purchase orders only
  - brand
  - earliest due date for lines on the purchase order being on or before a specified date
  - date created being on or before a specified date
  - purchase order number
  - sales order number
  - country and, optionally, state/province or territory for shipping address

  After searching for purchase orders that match your criteria, you can select any or all displayed purchase orders and generate pack slips.
- **Select Item:** Optionally, you can restrict pack slip generation to purchase orders that include a particular item. You can also limit the pack slips to generate based on the quantity of the selected item. Once you have specified the item and maximum quantity, you can specify whether to generate pack slips for single-line purchase orders only, or only purchase orders for a specific brand.

Multi-line purchase orders: A purchase order can include more than one line. When you generate a pack slip for a multi-line purchase order, the pack slip includes all lines on the purchase order, provided they are in **New Order** status, even if you use the **Select Item** option.

Lines in different statuses? Only lines in **New Order** status are eligible for pack slip generation. If a purchase order includes a line in **New Order** status and another line in **Held** or **Canceled** status, the generated pack slip includes only the line in **New Order** status.

There is no option to force a purchase order to ship complete or to prevent splitting a purchase order across more than one pack slip.

Limiting the total number of pack slips: If you specify a **Max POs** number to generate when using the **All POs** option, or specify a **Max Units** number to generate when using the **Select Item** option, pack slips are generated in chronological order based on when the Vendor Portal received the purchase orders, starting with the oldest eligible purchase orders.

Confirmation window? If you generate pack slips by item, the *Generate Pack Slip Confirmation* window opens. You need to click **Accept** at this window to generate pack slips. See that window for more information.

What happens when you generate pack slips? When you generate a pack slip:

- The Vendor Portal assigns a batch ID to the group of generated pack slips, and creates:
  - a PDF version of the *Pack Slip*, if specified under *Vendor Configuration*. If you generate multiple pack slips for the same brand, the Vendor Portal generates a single PDF file containing all the pack slips you have just generated for the brand. The PDF file includes pack slips in chronological order based on when the purchase orders were received by the vendor portal (oldest first).
  - a *Pack Slip Batch Pullsheet* listing the items to pick, if specified under *Vendor Configuration*.
  - a *Pack Slip CSV File* that includes a row for every purchase order line, if specified under *Vendor Configuration*. If there are multiple purchase orders for the same brand, the Vendor Portal generates a single CSV file containing all the items on pack slips you have just generated for the brand.

> **Note:**
>
> If the batch of pack slips includes multiple brands, there is a separate PDF file, pullsheet, and CSV file for each brand.

- The status of the purchase order line changes to **In Process**. If this is the only line on the purchase order, or if you generate a pack slip for the entire purchase order, the status of the purchase order itself also changes to **In Process**. See *Order Status* for a discussion of possible purchase order statuses.
- The Vendor Portal tracks the date and time when the pack slip was generated, the user ID of the person who generated the pack slip, and the batch ID. The date and time might not be your local date and time, if the retailer uses a server in a different time zone. For example, if your store location is on Eastern Standard time, and the retailer uses a server that is on Pacific time, the date and time displayed might be earlier than the current time in your location. You can review this history at the *History tab* of the *Purchase Order* screen.
- A PDF icon ( ) appears at the top of the screen once the PDF and CSV file generation is complete. Click this icon to advance to the *View Printed Pack Slips* screen to work with the generated files.

Address changes or cancellations? Occasionally the customer updates the shipping address for a purchase order or requests a cancellation. If a shipping address change or cancellation request occurs:

- before you generate the pack slip, while the purchase order or line is still in **New Order** status: the Vendor Portal updates the purchase order automatically.
- after you have generated a pack slip for a purchase order, changing the status of the line(s) to **In Process**: you need to use the *Purchase Order Change Requests* screen to accept these changes, or reject them if it is too late to change or cancel the purchase order.

If the customer requests a change or cancellation after the purchase order is shipped, the Vendor Portal automatically rejects the request.

See the *Purchase Order Change Requests* screen for more information.

Option	Procedure
generate pack slips for all eligible purchase orders	• The **All POs** option is selected by default when you advance to the **Select Purchase Orders** screen. Optionally, use the *Search fields if All POs is selected* to restrict the purchase orders selected for pack slip generation. • Click **Generate**. • A PDF icon ( ) appears at the top of the screen once the PDF and CSV file generation is complete. Click this icon to advance to the *View Printed Pack Slips* screen to work with the generated files.
generate pack slips for selected purchase orders	• Click **Select POs**. • Optionally, use the *Search fields if Select POs is selected* and click **Search** to restrict the displayed purchase orders to those that match your criteria. • Select individual purchase orders for pack slip generation by clicking the selection box next to the purchase order, or select all displayed purchase orders by clicking the selection box at the top of the search results. • Click **Generate**. • A PDF icon ( ) appears at the top of the screen once the PDF and CSV file generation is complete. Click this icon to advance to the *View Printed Pack Slips* screen to work with the generated files.

<table>
<tr><th>Option</th><th>Procedure</th></tr>
<tr><td>generate pack slips for a selected item</td><td>

Click Select Item.
Optionally, use the Search fields if Select Item is selected and click Search to restrict the displayed items to those that match your criteria.
Select each item you want to include by clicking the selection box next to the item.
Use the Max Units field to specify the total number of units of that item to include on generated pack slips.

Not exceeding the maximum: If you enter a maximum that is lower than the total number of eligible units, the Vendor Portal enforces this maximum or generates pack slips for a smaller quantity.
Example: The total number of eligible units for dining room chairs is 12, and you enter a maximum of 10. There are 3 existing purchase orders for the item, each for a quantity of 4. The vendor portal generates pack slips for 2 purchase orders, for a total printed quantity of 8.
Additional items on the purchase order: This maximum applies to the selected item only. If there are additional items on the purchase order and you do not select the Single Line POs only option at the confirmation window when you generate pack slips, then these items are also included on the pack slip.
You specify Max Units of 4 chairs. The next eligible purchase order includes 4 chairs, plus a table and a sideboard. The pack slip includes the chairs, the table, and the sideboard.

Click Generate.
At the Generate Pack Slip Confirmation window, you have the option to select:

a Brand from the dropdown list to generate pack slips for this brand only
the Single Line POs Only option to generate pack slips only for purchase orders that consist of a single line of the item in New Order status.

Click Accept at the Generate Pack Slip Confirmation window to generate the pack slips for all lines in New Order status that meet your selected criteria, or click Reject at that window to cancel.

Note:
The screen displays an error message if you select either or both of the options above and click Accept, and there are no purchase orders that meet the selected criteria.
A PDF icon ( ) appears at the top of the screen once the PDF and CSV file generation is complete. Click this icon to
</td></tr>
</table>

Option	Procedure
	advance to the *View Printed Pack Slips* screen to work with the generated files.
advance to purchase order inquiry	Click the edit/display icon ( ) labeled **PO Inquiry** to advance to the *Purchase Order* screen, where you can review additional information about the purchase order. This option is available only when the **Select POs** option is selected.
refresh the summary table	Ways to update the information currently displayed in the *Summary table*: • Switch between the current selection option (**All POs**, **Select POs**, or **Select Item**) and another selection option. • If the **Select POs** or **Select Item** option is selected: Click **Search**. • If the **All POs** option is selected (default): Close the **Select Purchase Orders** screen and reopen it. • Click **Generate** to produce a batch of pack slips.
work with generated pack slips	A PDF icon ( ) appears at the top of the screen once the PDF and CSV file generation is complete. Click this icon to advance to the *View Printed Pack Slips* screen to work with the generated files.

Fields	Description
Summary table (unlabeled table at the upper right of the screen) **To update the information in this summary table:** • Switch between the current selection option (**All POs**, **Select POs**, or **Select Item**) and another selection option. • If the **Select POs** or **Select Item** option is selected: Click **Search**. • If the **All POs** option is selected (default): Close the **Select Purchase Orders** screen and reopen it. • Click **Generate** to produce a batch of pack slips.	
POs	Includes: • **New** = The total number of purchase orders that include at least one line in **New Order** status • **In Process** = The total number of purchase orders that include at least one line in **In Process** status • **Held** = The total number of purchase orders that include at least one line in **Held** status A purchase order can be included in more than one column if, for example, it includes one line in **New Order** status and one line in **Held** status.

Fields	Description
Single Line POs	Includes: • **New** = The total number of single-line purchase orders that are in **New Order** status • **In Process** = The total number of single-line purchase orders that are in **In Process** status • **Held** = The total number of single-line purchase orders that are in **Held** status A single-line purchase order can be included in only one of these columns.
Units	Includes: • **New** = The total unit quantity on all lines that are in **New Order** status • **In Process** = The total unit quantity on all lines that are in **In Process** status and included on generated pack slips ("printed quantity") • **Held** = The total unit quantity on all lines that are in **Held** status and not on generated pack slips
# Distinct Items	Includes: • **New** = The total number of different items are in **New Order** status • **In Process** = The total number of different items that are in **In Process** status • **Held** = The total number of different items that are in **Held** status For example, you have 8 new purchase orders for a total of 20 units of item AB123, and you also have 12 new purchase orders for a total of 12 units of item CD234. The total number of distinct items in **New Order** status is 2 (AB123 and CD234).

Search fields if All POs is selected
Optionally, use the fields described below and then click **Generate** to generate pack slips for all purchase orders meeting your criteria.

You can also click **Generate** without selecting any criteria to generate all eligible pack slips.

There are no results fields displayed when you use the **All POs** option.

> **Note:**
>
> When **All POs** is selected, the screen does not display any search results; however, you can use the *Summary table* to review the total numbers of purchase orders and purchase order lines eligible for pack slip generation.

Fields	Description
Single Line POs Only	Select this option to generate pack slips for all purchase orders that consist of a single line in **New Order** status. Eligibility: • A single-line purchase order can include a single line with a quantity greater than one: for example, an order for four matching chairs. • A purchase order is not a single-line order if it includes more than one line even if, for example, it includes a single line in **New Order** status and another line in **Held**, **Shipped**, or **Canceled** status. Leave this option unselected to generate pack slips for purchase orders regardless of the number of lines.
Brand	Optionally, select a brand from the dropdown list to generate pack slips for this brand only.
Max POs	Optionally, enter the maximum number of pack slips to generate. You should not enter a number larger than the number of new POs indicated in the *Summary table*. When you limit the number of pack slips, pack slips are generated in chronological order based on when the Vendor Portal received the purchase orders, starting with the oldest eligible purchase orders. If you do not enter a maximum number, the Vendor Portal generates pack slips for up to 500 purchase orders at a time; however, you can enter a maximum that exceeds this number.
Due Date	Optionally, select a due date from the calendar control to generate pack slips for purchase orders that include any lines with this due date or earlier, including revised due dates.
Country	Optionally, select a country from the dropdown list to generate pack slips only for purchase orders whose shipping addresses are in this country.
State	Optionally, select a state, province, or territory from the dropdown list to generate pack slips only for purchase orders whose shipping addresses are in this state, province, or territory. **Note:** You can select a state, province, or territory only after you first select a country, and only if there is a defined list of states, provinces, or territories for the country.

Fields	Description
Search fields if Select POs is selected **Searching for purchase orders:** You can use any combination of the fields below and click **Search** to display purchase orders matching your search criteria. All search fields are optional. **Which purchase orders are eligible?** Only purchase orders with at least one line in **New Order** status are eligible for pack slip generation. **For more information:** See *generate pack slips for selected purchase orders*, above, for information on generating pack slips using the **Select POs** option.	
Single Line POs Only	Optionally, select this option to display pack slips only for purchase orders that consist of a single line in **New Order** status. Eligibility: • A single-line purchase order can include a single line with a quantity greater than 1: for example, an order for four matching chairs. • A purchase order is not a single-line order if, it includes more than one line even if, for example, it includes a single line in **New Order** status and another line in **Held**, **Shipped**, or **Canceled** status. Leave this option unselected to generate pack slips for purchase orders regardless of the number of lines.
Brand	Optionally, select a brand from the dropdown list to display purchase orders for this brand only.
Due Date	Optionally, select a date from the calendar control to display purchase orders whose earliest original due date from any eligible line is on or before your entry.
Date Created	Optionally, select a date from the calendar control to display purchase orders created on that date or earlier. This is the created date provided by the retailer, and may be different from the date when the Vendor Portal received the purchase order.
PO Number	Optionally, enter a full or partial number or code identifying the purchase order in the originating system to display purchase orders that start with or match your entry. Can include numbers, letters, spaces, or special characters. Up to 50 positions. Not case-sensitive for searching; an entry of `A` or `a` matches a purchase order number of `A12345`.
Order Number	Optionally, enter a full or partial number or code identifying the sales order in the originating system to display purchase orders whose sales order number starts with your entry. Up to 30 positions. Not case-sensitive for searching; an entry of `A` or `a` matches an order number of `A12345`.
Country	Optionally, select a country from the dropdown list to display purchase orders shipping to the selected country.
State	Optionally, select a state, province, or territory from the dropdown list to display purchase orders shipping to the selected state, province, or territory. You can use this option only if you first select a country that has a defined list of states, provinces, or territories.

Fields	Description
Result fields if Select POs is selected Use the selection checkbox next to a purchase order and click **Generate** to include that purchase order when generating pack slips, or use the selection box at the top of the search results to include all displayed purchase orders for generation.	
PO Number	The number or code identifying the purchase order in the originating system.
Order Number	The number or code identifying the sales order in the originating system.
Brand	The retailer's brand that is associated with the sales order.
Due Date	The earliest original due date for a line on the purchase order. A red asterisk (*****) indicates that at least one line on the purchase order has a revised due date. You can revise the due date for a line at the *Edit Purchase Order Item* window or the *Purchase Order Maintenance* screen.
Date Created	The PO entered date provided by the retailer. Might not be the same as the date when the purchase order became available to you through the Vendor Portal.
Past Due	The number of days that the line with the earliest current (original or revised) due date is past due. For example, a purchase order includes a line with a due date of June 28, and another line with a due date of June 30. If today is July 1, the number of days past due is 3. Blank if none of the items on the purchase order are past due.
State	The code identifying the state where the purchase order is shipping. Two positions.
Country	The code identifying the country where the purchase order is shipping. Two or three positions.
S/L	A check ( ) indicates that this is a single-line purchase order.
PO Inquiry	Click the PO Inquiry icon ( ) to advance to the *Purchase Order Inquiry* screen, where you can reveal the details of the purchase order, such as the sold-to and ship-to address, items, history, and messages.
Search fields if Select Item is selected **Searching for items:** Optionally, you can use either of the fields below and click **Search** to display matching items on eligible purchase orders. **Which items are eligible?** Items are listed only if there is at least one line for the item in **New Order** status on a purchase order.	
Item	Your item number or code. Optionally, enter a full or partial item code to display items that start with or match your entry. For example, if you sell items ABC111 and ABC123, entering ABC1 matches both of these items. Up to 35 positions. Not case-sensitive for searching; an entry of `A` or `a` matches an item number of `A12345`.

Fields	Description
Retailer Item #	The retailer's item number or code. Optionally, enter a full or partial item code to display items that start with or match your entry. For example, if the retailer has item codes XYZ222 and XYZ234, entering XYZ2 matches both of these retailer items. Up to 35 positions. Not case-sensitive for searching; an entry of `A` or `a` matches a retailer item number of `A12345`.
Result fields if Select Item is selected See *generate pack slips for a selected item*, above, for information on generating pack slips using the **Select Item** option.	
Item #	Your item number or code.
Retailer Item #	The retailer's item number or code. Hold the pointer over the **Retailer Item #** to display the retailer's description of the item.
Item Description	The description of the item.
New POs	Purchase order totals include: • **All** = The total number of purchase orders that include a line for the item in **New Order** status • **S/L** (single-line) = The total number of single-line purchase orders for the item in **New Order** status • **M/L** (multi-line) = The total number of multi-line purchase orders that include a line for the item in **New Order** status
New PO Units	Unit totals include: • **All** = The total number of units of the item on purchase order lines in **New Order** status • **S/L** (single-line) = The total number of units of the item on single-line purchase orders in **New Order** status • **M/L** (multi-line) = The total number of units of the item multi-line purchase orders on lines in **New Order** status

Fields	Description
Max Units	Enter the maximum number of units of the selected item to include on generated pack slips and press **Enter** (not **Tab**). You should not enter a number larger than the total unit quantity in **New Order** status. Required. **Not exceeding the maximum:** If you enter a maximum that is lower than the total number of eligible units, the Vendor Portal enforces this maximum or generates pack slips for a smaller quantity. **Example:** The total number of eligible units for dining room chairs is 12, and you enter a maximum of 10. There are 3 existing purchase orders for the item, each for a quantity of 4. The vendor portal generates pack slips for 2 purchase orders, for a total printed quantity of 8. **Additional items on the purchase order:** This maximum applies to the selected item only. If there are additional items on the purchase order and you do not select the **Single Line POs only** option at the confirmation window when you generate pack slips, then these items are also included on the pack slip. **Example:** You specify **Max Units** of 4 chairs. The next eligible purchase order includes 4 chairs, plus a table and a sideboard. The pack slip includes the chairs, the table, and the sideboard.

Get Purchase Orders

Purpose: Use this screen to generate the pack slip, set the status to In Process, and assign the batch number for a single purchase order, all new purchase orders including a specific item, or all new purchase orders regardless of the items they include.

> **Note:**
>
> This screen is available only if you use the *vendor integration*. Contact the retailer for more information and see the *Integrated Vendor Process Flow* for an overview. Otherwise, you can use the Select Purchase Orders screen.

How to display this screen: Select **Get Purchase Orders** from the Home Screen or the **Purchase Orders** drop-down menu if you have the required authority and if the *vendor integration* is enabled.

Option	Procedure
generate the pack slip for all new purchase orders	• Make sure that *All POs* is selected. This option is selected by default when you advance to the **Get Purchase Orders** screen. • Click **Generate**. • Click **Accept** at the Generate Pack Slip Confirmation window, or click **Reject** at that window to cancel. If you select Accept, a message indicates that pack slip generation has been submitted for processing.
generate the pack slip for a specific purchase order	• Click *Single PO*. The *PO Number* field opens. Use this field to enter a purchase order number to generate the pack slip for that purchase order. • Click **Generate**. • Click **Accept** at the Generate Pack Slip Confirmation window, or click **Reject** at that window to cancel. If you select Accept, a message indicates that pack slip generation has been submitted for processing.
generate the pack slip for all new purchase orders that include a selected item	• Click *Single Item*. • The *Item #* field opens. Use this field to enter an item number in order to generate the pack slip for all new purchase orders that include the specified item. **Searching for an item:** You can click the search icon () to open a pop-up window displaying all items that have been assigned to you for fulfillment on purchase orders. Double-click the correct item to paste the item number into the *Item #* field. • Click **Generate**. • Click **Accept** at the Generate Pack Slip Confirmation window, or click **Reject** at that window to cancel. If you select Accept, a message indicates that pack slip generation has been submitted for processing. If no new purchase orders that include the selected item are found, an error message indicates that no purchase orders are available for generation.
refresh the Summary table	Close the screen and then reopen it. If any purchase order lines have shipped or been held since you last opened the screen, the summary information is updated.

Fields	Description
Search and Selection Options:	
All POs	Leave this option selected and click **Generate** to generate the pack slip for all new purchase orders.
PO Number	This field opens when you select the *Single PO* option. Use this field to enter the purchase order number to generate the pack slip for that purchase order. Your entry must be an exact match. You cannot prompt on this field. If necessary, use another screen, such as the Purchase Order Inquiry screen, to identify the correct purchase order number.

Fields	Description
Item Number Search window	This field opens when you select the *Single Item* option. Use this field to enter the item number to generate the pack slip for all purchase orders that include the specified item. **Searching for an item:** You can click the search icon ( ) to open a pop-up window displaying all items that have been assigned to you for fulfillment on purchase orders. Double-click the correct item to paste the item number into the *Item #* field.
Summary table (unlabeled table at the upper right of the screen) **To update the information in this summary table:** Close the screen and then reopen it. If any purchase order lines have shipped or been held since you last opened the screen, the summary information is updated.	
Last Generated On	The last date and time when the Vendor Portal has received a request for new purchase orders and sent the new purchase order(s) in the response message.
POs	Includes: • **New** = The total number of purchase orders that include at least one line that has not been sent to the integrated system. **Note:** This total does not include any purchase order that: – has had a pack slip voided and not reprinted – if the *Require Acknowledgement* flag at the Vendor Configuration screen is selected, may have been sent to the integrated system and been assigned a batch number, but has not been acknowledged by the integrated system. • **In Process** = The total number of purchase orders that include at least one line in **In Process** status. This total includes purchase orders with lines that have been assigned a batch number and, if the *Require Acknowledgement* flag at the Vendor Configuration screen is selected, have been acknowledged. • **Held** = The total number of purchase orders that include at least one line in **Held** status A purchase order can be included in more than one column if, for example, it includes one line in **New Order** status and one line in **Held** status.
Single Line POs	Includes: • **New** = The total number of single-line purchase orders that are in **New Order** status. • **In Process** = The total number of single-line purchase orders that are in **In Process** status. • **Held** = The total number of single-line purchase orders that are in **Held** status. A single-line purchase order can be included in only one of these columns.

Fields	Description
Units	Includes: • **New** = The total unit quantity on all lines that are in **New Order** status. • **In Process** = The total unit quantity on all lines that are in **In Process** status and included on generated pack slips ("printed quantity"). • **Held** = The total unit quantity on all lines that are in **Held** status and not on generated purchase orders.
# Distinct Items	Includes: • **New** = The total number of different items are in **New Order** status. • **In Process** = The total number of different items that are in **In Process** status. • **Held** = The total number of different items that are in **Held** status. For example, you have 8 new purchase orders for a total of 20 units of item AB123, and you also have 12 new purchase orders for a total of 12 units of item CD234. The total number of distinct items in **New Order** status is 2 (AB123 and CD234).

Generate Pack Slip Confirmation

Purpose: Use this window to confirm the generation of pack slips at the *Select Purchase Orders* screen if you are generating pack slips by item.

How to display: Click **Generate** at the *Select Purchase Orders* screen if you are generating pack slips by item, or the *Get Purchase Orders* screen if you use the *vendor integration*.

Completing this window:

- If you are generating pack slips by item and are not using the *vendor integration* (see *generate pack slips for a selected item*):
  - Optionally, select a *Brand* to generate pack slips for that brand only. If there is only a single brand, that brand defaults.
  - Optionally, select the *Single Line POs Only* option to generate pack slips only for single-line purchase orders.
  - Otherwise, if you are using the *vendor integration*, these options are not available at the window.
- Click **Accept** to generate pack slips; otherwise, click **Reject**.

> **Note:**
>
> The originating screen displays an error message if you select either or both of the options above and click **Accept**, and there are no purchase orders that meet the selected criteria.

Pack slip icon: The Vendor Portal displays the pack slip icon at the top of the screen when it has finished generating the pack slips. Click that icon to advance to the *View Printed Pack Slips* screen, where you can review and print the generated pack slips.

Field	Description
Brand	Optionally, select a brand from the dropdown list to generate pack slips for this brand only. This option is available only if you opened this window from the *Select Purchase Orders* screen (not using the *vendor integration*). If there is only a single brand, that brand defaults.
Single Line POs Only	Optionally, select this option to generate pack slips only for purchase orders that consist of a single line in **New Order** status. This option is available only if you opened this window from the *Select Purchase Orders* screen (not using the *vendor integration*). Eligibility: • A single-line purchase order can include a single line with a quantity greater than 1: four example, an order for four matching chairs. • A purchase order is not a single-line order if, it includes more than one line even if, for example, it includes a single line in **New Order** status and another line in **Held**, **Shipped**, or **Canceled** status. Leave this option unselected to generate pack slips for purchase orders regardless of the number of lines.

View Printed Pack Slips

Purpose: Use the **View Printed Pack Slips** screen to print pack slips and pullsheets for purchase orders or to download a CSV file of the purchase orders for extract to your system.

Dependent on configuration: The *Vendor Configuration* settings specify whether to generate a PDF pack slip, a PDF pullsheet, and a CSV file when you generate pack slips. Also, the configuration settings whether to generate the graphical or non-graphical version of the pack slip. These settings apply regardless of whether you use the *vendor integration*, so that if the Vendor Portal puts a batch of purchase orders into **In Process** status through the integration, the documents on this screen are still generated.

Deleted automatically: Generated pack slips and pullsheets are deleted automatically after a number of days specified by the retailer.

How to display this screen: This screen opens when you click the pack slip icon at the top of the screen indicating that the Vendor Portal has finished generating pack slips. You can also display this screen by selecting **View Printed Pack Slips** from the *Home Screen* or the **Purchase Orders** drop-down menu if you have the required authority.

How to generate pack slips: You can generate pack slips by:

- clicking **Accept** at the *Generate Pack Slip Confirmation* window after using the *Select Purchase Orders* screen to generate pack slips
- using the *Void / Reprint Pack Slip* screen to reprint a pack slip

- selecting the **Reprint Pack Slip** option at the *Purchase Order* screen to reprint a pack slip

Option	Procedure
search for batches of generated pack slips	When you first advance to this screen, all existing generated batches are displayed. You can search by completing any of the *Search fields* and clicking **Search**.
view or print pack slips	Click the PDF icon ( ) in the *Pack Slips* column to open the PDF file in a separate tab. See the *Pack Slip* for more information. **No pack slip?** If the *Vendor Configuration* settings specify not to produce a PDF pack slip, no PDF is generated and this field is blank. **Pack slip error?** An error icon ( ) indicates that the retailer has not specified a valid program to use when generating the pack slip for the brand. Contact the retailer for more information. **Window width:** In Chrome, the pack slip is displayed in a window 800 pixels wide.
view or print a pullsheet	Click the PDF icon ( ) in the *Pullsheet* column to open the PDF file in a separate tab. The pullsheet includes a line for each purchase order line in the batch, so you can use the pullsheet to facilitate picking the items. See the *Pack Slip Batch Pullsheet* for more information. **No pullsheet?** If the *Vendor Configuration* settings specify not to produce a pullsheet, no PDF is generated and this field is blank. Contact the retailer for more information. **Pullsheet error?** An error icon ( ) indicates that the retailer has not specified a valid program to use when generating the pullsheet for the brand. Contact the retailer for more information. **Window width:** In Chrome, the pullsheet is displayed in a window 800 pixels wide.
download a CSV file of pack slips	Click the CSV icon ( ) to download a file containing the same information as the pack slip. The file is in CSV (comma-separated value) format, so that you can easily open it in a spreadsheet application such as Microsoft Excel. When you click the icon, a separate tab opens, and your browser (such as Internet Explorer or Chrome) presents the option to save and open the CSV file. See the *Pack Slip CSV File* for more information. **No file?** If the *Vendor Configuration* settings specify not to produce a CSV file, no file is generated and this field is blank. This field is also blank if the retailer has not specified a valid program to use when generating the pack slip for the brand. Contact the retailer for more information. **CSV error?** An error icon ( ) indicates that the Vendor Portal encountered an error when attempting to generate the CSV file. Contact the retailer for more information.

Option	Procedure
delete a batch of generated pack slips	Click the delete icon ( ) to delete the batch of pack slips and the related PDF and CSV files if you have completed processing of the batch. **Note:** You can use the *Void / Reprint Pack Slip* screen or the **Reprint Pack Slip** option at the *Purchase Order* screen to reprint a pack slip if you delete it inadvertently.

Fields	Description
Search fields	
Batch #	Optionally, enter a full or partial batch number and click **Search** to display batches that start with or match your entry. This is the number assigned by the Vendor Portal to identify a group of pack slips generated at the same time. A batch can include a single pack slip. Batch numbers are not necessarily sequential. **Note:** If the batch of pack slips includes multiple brands, there is a separate entry at the screen for each brand, each with a separate PDF file, pullsheet, and CSV file, if generated.
Brand	Optionally, select a brand from the dropdown list and click **Search** to display batches of pack slips generated for this brand only.
Generate Date	Optionally, select a date from the calendar control and click **Search** to display batches generated on that date only.
Submitted By	Optionally, enter a full or partial user ID and click **Search** to display batches submitted by users whose IDs start with your entry. Not case-sensitive for searching; an entry of `A` or `a` matches a user ID of `AJOHNSON`.
Result fields	

Fields	Description
Batch #	The number assigned by the Vendor Portal to identify a group of pack slips generated at the same time. A batch can include a single pack slip. Batch numbers are not necessarily sequential. **Note:** If a batch of pack slips includes multiple brands, there is a separate entry at the screen for each brand, each with a separate PDF file, pullsheet, and CSV file, if generated.
Brand	The retailer’s brand that is associated with the sales orders originating the purchase orders.
Generate Date	The date and time when the batch of pack slips was generated. The date and time might not be your local date and time, if the retailer uses a server in a different time zone. For example, if your store location is on Eastern Standard time, and the retailer uses a server that is on Pacific time, the date and time displayed might be earlier than the current time in your location.
Submitted By	The user ID of the person who submitted the batch of pack slips.
Pages	The total number of pages in the pack slip PDF.
Pack Slips	Click the PDF icon ( ) in the *Pack Slips* column to open the PDF file in a separate tab. See the *Pack Slip* for more information. **No pack slip?** If the *Vendor Configuration* settings specify not to produce a PDF pack slip, no PDF is generated and this field is blank. Contact the retailer for more information. **Pack slip error?** An error icon ( ) indicates that the retailer has not specified a valid program to use when generating the pack slip for the brand. Contact the retailer for more information.

Fields	Description
Pullsheet	Click the PDF icon ( ) in the *Pullsheet* column to open the PDF file in a separate tab. The pullsheet for a batch and brand includes a line for each purchase order line, so you can use the pullsheet to facilitate picking the items. See the *Pack Slip Batch Pullsheet* for more information. **No pullsheet?** If the *Vendor Configuration* settings specify not to produce a pullsheet, no PDF is generated and this field is blank. Contact the retailer for more information. **Pullsheet error?** An error icon ( ) indicates that the retailer has not specified a valid program to use when generating the pullsheet for the brand. Contact the retailer for more information.
CSV File	Click the CSV icon ( ) to download a file containing the same information as the pack slip. The file is in CSV (comma-separated value) format, so that you can easily open it in a spreadsheet application such as Microsoft Excel. When you click the icon, a separate tab opens, and your browser (such as Internet Explorer or Chrome) presents the option to save and open the CSV file. See the *Pack Slip CSV File* for more information. **No file?** If the *Vendor Configuration* settings specify not to produce a CSV file, no file is generated and this field is blank. This field is also blank if the retailer has not specified a valid program to use when generating the pack slip for the brand. Contact the retailer for more information. **CSV error?** An error icon ( ) indicates that the Vendor Portal encountered an error when attempting to generate the CSV file. Contact the retailer for more information.
Delete	Click the delete icon ( ) to delete the batch of pack slips and the related PDF and CSV files if you have completed processing of the batch. **Note:** You can use the *Void / Reprint Pack Slip* screen or the **Reprint Pack Slip** option at the *Purchase Order* screen to reprint a pack slip if you delete it inadvertently.

Pack Slip

Purpose: The contents of the pack slip are described below.

How to generate:

- **If you use the Vendor Portal for pack slip generation:** Use the *Select Purchase Orders* screen to generate pack slips.
- **If you use the *vendor integration*:** Send a batch of purchase orders to the integrated system, and receive an acknowledgement if required. See the *Integrated Vendor Process Flow* for background.

You can also generate this file by using the *Void / Reprint Pack Slip* screen to reprint a pack slip. When you void and reprint a pack slip, the batch consists only of that pack slip.

The Vendor Portal generates a PDF pack slip only if specified by the *Vendor Configuration* settings. Contact the retailer for more information.

Pack slip sequence: The pack slips within each PDF file are in chronological order based on when the Vendor Portal received the purchase orders (oldest to newest).

Graphical or non-graphical? The *Vendor Configuration* settings specify whether to generate the graphical or non-graphical version of the pack slip, based on whether you use pre-printed forms. Both versions include the same information.

Language and formats: The language, date and time formats, and number formats are from the retailer's organization.

How to view: Click the PDF icon ( ) in the **Pack Slips** column of the *View Printed Pack Slips* screen to open the PDF file containing pack slips. The pack slips open in a new tab, and the tab's title indicates the batch and the brand (for example, a tab title of **PDF:Pack Slips 443-001 Red Panda** indicates batch 443 for the Red Panda brand).

No pack slip? If the *Vendor Configuration* settings specify not to produce a PDF pack slip, no PDF is generated and the PDF icon is not displayed in the **Pack Slips** column of the *View Printed Pack Slips* screen.

Window width: In Chrome, the pack slip is displayed in a window 800 pixels wide.

Pack slip error? An error icon ( ) in the **Pack Slips** column of the *View Printed Pack Slips* screen indicates that the retailer has not specified a valid program to use when generating the pack slip for the brand. Contact the retailer for more information.

Fields	Description
Logo	The logo for the retailer's brand that is associated with the purchase order.

Fields	Description
Ordered By:	The name and address of the sold-to customer. Includes the: • company name, if any • first, middle, and last name, if any • first two address lines • apartment or suite number • city, state, postal code, and country code Additional information about the sold-to customer is available for review at the *Purchase Order* screen.
Ship To:	The name and address of the customer receiving the shipment. Includes the: • company name, if any • first, middle, and last name, if any • first two address lines • apartment or suite number • city, state, postal code, and country code • attention line, if any **Note:** The graphical version of the pack slip includes the **Attention:** label if there is an attention line included in the ship-to address.
Pack slip message (unlabeled field below the Ordered By)	A message specified by the retailer to print on all pack slips for this brand.
Customer #	The number identifying the sold-to customer in the retailer’s system.
Carrier (unlabeled field to the right of the customer number)	The carrier designated to ship the order.
Order message (unlabeled field below the customer number)	The order message, if any. Can be multiple lines of text. Up to four total lines of order message and gift message text can be displayed, or up to 255 positions (characters and spaces).
Gift message (unlabeled field below the order message)	The gift message, if any. Can be multiple lines of text. **Note:** If there is both an order message and a gift message, the first line of the gift message starts on the last line of the order message.
Header information	

Fields	Description
Date of Order	The PO created (entered) date provided by the retailer. Might not be the same as the date when the purchase order became available to you through the Vendor Portal.
Purchase Order No.	The number or code identifying the purchase order in the retailer's system.
Batch No.	The batch number assigned by the Vendor Portal to identify the pack slips generated at the same time.
Packer	Left blank.
Shipped Via	The name of the carrier designated to ship the order.
Customer No	The number identifying the sold-to customer in the retailer's system.
Order No.	A number or code identifying the sales order in the retailer's system.
Page No.	The page number on the pack slip.
For each line on the pack slip:	
Line No.	A unique number identifying the item on the purchase order.
Items Ordered	The total ordered quantity of the item for the purchase order line.
Items Shipped	The total quantity of the item to ship. Same as the ITEMS ORDERED unless you have used the *Void / Reprint Pack Slip* screen to change the printed quantity.
Item Number	The retailer's item number or code.
Description	The retailer's description of the item.
Unit Price	The customer's unit price for the item. Not printed if the order is flagged as a gift.
Extension	The customer's extended price for the item (quantity * unit price). Not printed if the order is flagged as a gift.
Information for the item may also include:	
Customization	This label indicates that the following lines are the customization instructions for the item, including: • a code identifying the type of customization, such as monogramming, ink color, or script • the customization instructions themselves The total handling charges for the item are listed in the *Extension* column; however, no prices print if the order is flagged as a gift.
order line messages (unlabeled field after an order line and customization, if any)	Any order line messages from the sales order.
Totals • If the pack slip prints on more than one page, the totals are blank except for the last page of the pack slip. • If there are multiple pack slips generated for a purchase order, the totals print on the first generated pack slip only; in this case, the totals are blank on any additional pack slips generated, and the pack slip includes the message: **Other Items Shipped Separately**.	
Total Merchandise	The total extended price of all items on the pack slip. Not printed if the order is flagged as a gift.

Fields	Description
Shipping & Handling	The total extended shipping and handling charges for all items on the sales order. Not printed if the order is flagged as a gift. **Multiple pack slip for a purchase order?** If this is not the first pack slip for the purchase order, then shipping charges related to the prior shipment or to the purchase order as a whole are included in the first pack slip and not the current pack slip. There might be multiple pack slips for a purchase order if, for example, you put a line on hold before generating the first pack slip, then released the held line before generating the next pack slip.
Sales Tax	The total sales tax for the sales order. Includes any tax on freight. Not printed if the order is flagged as a gift.
Order Total	The total of all merchandise, shipping and handling, and sales tax. Not printed if the order is flagged as a gift.
Total Paid	The total amount prepaid for the pack slip, such as checks, cash, merchandise credits, or gift cards. May be blank if this information is not passed by the retailer. Not printed if the order is flagged as a gift.
Refund	The total refund due for the pack slip. May be blank if this information is not passed by the retailer. Not printed if the order is flagged as a gift.
Bal. Due	The total balance due for the pack slip. May be blank if this information is not passed by the retailer. Not printed if the order is flagged as a gift.
order total (unlabeled field)	The total of all merchandise, shipping and handling, and sales tax. The same as the *Order Total*. Not printed if the order is flagged as a gift.
ship-to address labels (unlabeled fields)	Two labels, each including: • company name, if any • first, middle, and last name, if any • first two address lines • apartment or suite number • city, state, postal code, and country code • attention line, if any **Note:** The graphical version of the pack slip includes the **Attention:** label if there is an attention line included in the ship-to address.
Return To:	The return address for the retailer’s brand, as specified by the retailer.

Pack Slip Batch Pullsheet

Purpose: The pullsheet includes a line for each purchase order line included in the batch, providing a checklist you can use for picking the items for each pack slip. The contents of the pack slip batch pullsheet are described below.

How to generate:

- **If you use the Vendor Portal for pack slip generation:** Use the *Select Purchase Orders* screen to generate pack slips.
- **If you use the** *vendor integration***:** Send a batch of purchase orders to the integrated system, and receive an acknowledgment if required. See the *Integrated Vendor Process Flow* for background.

You can also generate this file by using the *Void / Reprint Pack Slip* screen to reprint a pack slip. When you void and reprint a pack slip, the batch consists only of that pack slip.

How to view: Click the PDF icon ( ) in the **Pullsheet** column of the *View Printed Pack Slips* screen to open the PDF file containing the pullsheet. The pullsheet opens in a new tab, and the tab's title indicates the batch and the brand (for example, a tab title of **PDF:Pull Sheet 443-001 Red Panda** indicates batch 443 for the Red Panda brand).

Language and formats: The language, date and time formats, and number formats are from the Data Formats Options selected at the *Vendor Configuration* screen.

No pullsheet? If the *Vendor Configuration* settings specify not to produce a pullsheet, no PDF is generated and no PDF icon is displayed in the **Pullsheet** column of the *View Printed Pack Slips* screen. Contact the retailer for more information.

Pullsheet error? An error icon ( ) in the **Pullsheet** column of the *View Printed Pack Slips* screen indicates that the retailer has not specified a valid program to use when generating the pullsheet. Contact the retailer for more information.

Window width: In Chrome, the pullsheet is displayed in a window 800 pixels wide.

Fields	Description
Logo	The logo for the retailer's brand that is associated with the purchase orders in the batch.
brand name (unlabeled field)	The retailer's brand name.
vendor code (unlabeled field)	The code or number identifying your company to the retailer.
date and time generated (unlabeled field)	The date and time when you generated the batch of pack slips. The date and time might not be your local date and time, if the retailer uses a server in a different time zone. For example, if your store location is on Eastern Standard time, and the retailer uses a server that is on Pacific time, the date and time displayed might be earlier than the current time in your location.
Batch #	The batch number assigned by the Vendor Portal to identify the group of pack slips generated at the same time.
Total POs	The total number of purchase orders included in the batch.
Total Lines	The total number of purchase order lines included in the the batch.
Total Units	The total number of units on all purchase order lines and all items included in the batch.

Fields	Description
for each purchase order line for the same brand in the batch	
PO #	The number or code identifying the purchase order in the retailer's system.
Order #	A number or code identifying the sales order in the retailer's system.
Ship To Name	The last name and first name or company name of the customer receiving the shipment. Truncated if it exceeds the available space.
Line #	A unique number identifying the item on the purchase order.
Item #	Your item number or code. Truncated if it exceeds the available space.
Retailer Item #	The retailer's item number. Truncated if it exceeds the available space.
Item Description	A description of the item. Truncated if it exceeds the available space.
Order Qty	The quantity of the item to ship.
Carrier	The code identifying the designated carrier. Truncated if it exceeds the available space.
Tracking #	A space for you to enter the tracking number for a shipment.
Weight	A space for you to enter the weight of a shipment.
Rate	A space for you to enter the rate of a shipment.
Totals:	
Vendor Item Count	Each item included in the batch pullsheet, and the total quantity of each.

Pack Slip CSV File

Purpose: The contents of the pack slip CSV file are described below. This file contains the same information as the *Pack Slip*, with a separate row for each purchase order line included in the batch. The file is in CSV (comma-separated value) format, so that you can easily open it in a spreadsheet application such as Microsoft Excel.

How to generate:

- **If you use the Vendor Portal for pack slip generation:** Use the *Select Purchase Orders* screen to generate pack slips.
- **If you use the *vendor integration*:** Send a batch of purchase orders to the integrated system, and receive an acknowledgment if required. See the *Integrated Vendor Process Flow* for background.

You can also generate this file by using the *Void / Reprint Pack Slip* screen to reprint a pack slip. When you void and reprint a pack slip, the batch consists only of that pack slip.

How to download: Click the CSV icon () at the *View Printed Pack Slips* screen. When you click the icon, a separate tab opens, and your browser (such as Internet Explorer or Chrome) presents the option to save and open the CSV file.

No file? If the *Vendor Configuration* settings specify not to produce a CSV file, no file is generated and no icon is displayed in the **CSV File** column at the *View Printed Pack Slips* screen. This field is also blank if the retailer has not specified a valid program to use when generating the pack slip for the brand. Contact the retailer for more information.

CSV error? An error icon (✖) in the **CSV File** column at the *View Printed Pack Slips* screen indicates that the Vendor Portal encountered an error when attempting to generate the CSV file. Contact the retailer for more information.

How to open: When you click the file, it opens in your default spreadsheet application, such as Microsoft Excel.

About numeric fields: When you open the file in a spreadsheet application, numeric fields are formatted as numbers: right-aligned and leading zeros removed. This formatting also applies to phone numbers and postal codes if they do not include any non-numeric characters. Decimal positions are also removed for whole numbers; for example, a dollar value of $10.00 is formatted as 10, although a value of $10.01 retains the decimal.

Fields	Description
Batch No.	The batch number assigned by the Vendor Portal to identify the pack slips generated at the same time.
PO No.	The number or code identifying the purchase order in the retailer's system. Up to 7 positions.
Order No.	A number or code identifying the sales order in the retailer's system. Up to 8 positions.
Customer No.	The number identifying the sold-to customer in the retailer's system. Up to 9 positions.
Brand	A number identifying the retailer's brand. Up to 3 positions.
Date of Order	The PO created (entered) date provided by the retailer. Might not be the same as the date when the purchase order became available to you through the Vendor Portal.
Order First Name	The first name of the sold-to customer. Up to 15 positions.
Order Last Name	The last name of the sold-to customer. Up to 25 positions.
Order Company	The company name of the sold-to customer. Up to 30 positions. **Note:** The sold-to customer has either a first and last name or a company name, or both.
Order Prefix	The prefix for the sold-to customer's name, such as Mr. or Dr. Up to 3 positions.
Order Suffix	The suffix for the sold-to customer's name, such as Jr. or Esq. Up to 3 positions.
Order Address 1	The first address line for the sold-to customer. Up to 32 positions.

Fields	Description
Order Address 2	The second address line, if any, for the sold-to customer. Up to 32 positions.
Order Address 3	The third address line, if any, for the sold-to customer. Up to 32 positions.
Order Address 4	The fourth address line, if any, for the sold-to customer. Up to 32 positions.
Order Apt	The apartment or suite number, if any, for the sold-to customer. Up to 10 positions.
Order City	The city for the sold-to customer. Up to 25 positions.
Order State	The code identifying the state or province for the sold-to customer. Always included for addresses in the US and Canada. Two positions.
Order Postal Code	The zip or postal code for the sold-to customer. Up to 10 positions. **Note:** A spreadsheet application such as Microsoft Excel might automatically remove any leading zeroes, changing a postal code of 02135 to 2135.
Order Country	The 2-position or 3-position code identifying the country for the sold-to customer.

Note:

The ship-to information is always included, even if it is the same as the sold-to information.

Fields	Description
Ship To First Name	The first name of the ship-to customer. Up to 15 positions.
Ship To Last Name	The last name of the ship-to customer. Up to 25 positions.
Ship To Company	The company name of the ship-to customer. Up to 30 positions. **Note:** The ship-to customer has either a first and last name or a company name, or both.
Ship To Prefix	The prefix for the ship-to customer's name, such as Mr. or Dr. Up to 3 positions.

Fields	Description
Ship To Suffix	The suffix for the ship-to customer's name, such as Jr. or Esq. Up to 3 positions.
Ship To Address 1	The first address line for the ship-to customer. Up to 32 positions.
Ship To Address 2	The second address line, if any, for the ship-to customer. Up to 32 positions.
Ship To Address 3	The third address line, if any, for the ship-to customer. Up to 32 positions.
Ship To Address 4	The fourth address line, if any, for the ship-to customer. Up to 32 positions.
Ship To Apt	The apartment or suite, if any, for the ship-to customer. Up to 10 positions.
Ship To City	The city for the ship-to customer. Up to 25 positions.
Ship To State	The code identifying the state or province for the ship-to customer. Always included for addresses in the US and Canada. Two positions.
Ship To Postal Code	The zip or postal code for the ship-to customer. Up to 10 positions. **Note:** A spreadsheet application such as Microsoft Excel might automatically remove any leading zeroes, changing a postal code of 02135 to 2135.
Ship To Country	The 2-position or 3-position code identifying the country for the sold-to customer.
Ship To Day Phone	The day phone number for the ship-to. May include formatting applied by the retailer's system. Up to 14 positions.
Ship Via	The code identifying the carrier designated for the purchase order line. Numeric; up to 2 positions.
Ship Via Description	The description of the designated carrier. Up to 30 positions.
Line No.	A unique number identifying the item on the purchase order. Up to 3 positions.
Retailer Item Number	The retailer's item number or code. Up to 27 positions.
Retailer Item Description	The retailer's description of the item. Up to 40 positions.
Vendor Item Number	Your item number. Up to 20 positions.
Vendor Item Description	Your item description. Up to 30 positions.
Retailer Items Ordered	The total ordered quantity of the item for the purchase order line. Up to 7 positions.

Fields	Description
Retailer Items Shipped	The total quantity of the item to ship. Same as the **Retailer Items Ordered** unless you have used the *Void / Reprint Pack Slip* screen to void a partial quantity of the purchase order line.
Retailer Unit of Measure	The retailer's code for the unit of measure. Informational only; unit of measure conversion is not supported. Up to 3 positions.
Vendor Items Ordered	Same as the **Retailer Items Ordered**.
Vendor Items Shipped	The total quantity of the item to ship. Same as the **Vendor Items Ordered** unless you have used the *Void / Reprint Pack Slip* screen to void a partial quantity of the purchase order line.
Vendor Unit of Measure	Your code for the unit of measure. Up to 3 positions. Informational only; unit of measure conversion is not supported.
Unit Price	The customer's unit price for the item. The price is zero if the order is flagged as a gift. Up to 7 positions, including a 2-place decimal. **Note:** A spreadsheet application such as Microsoft Excel might automatically remove the digits to the right of the decimal if they are set to .00; for example, a price of $10.00 is formatted as 10.
Extension	The customer's extended price for the item (quantity * unit price). The extended price is zero if the order is flagged as a gift. Up to 11 positions, including a 2-place decimal. **Note:** A spreadsheet application such as Microsoft Excel might automatically remove the digits to the right of the decimal if they are set to .00; for example, an amount of $10.00 is formatted as 10.

If there are multiple pack slips: If there are multiple pack slips for a purchase order, the totals are included for the first generated pack slip only; in this case, the totals are zero for any additional pack slips generated.

Fields	Description
Total Merchandise	The total extended price of all items on the pack slip. Repeated for each line on the pack slip. The total is zero if the order is flagged as a gift. Up to 11 positions, including a 2-place decimal. **Note:** A spreadsheet application such as Microsoft Excel might automatically remove the digits to the right of the decimal if they are set to .00; for example, an amount of $10.00 is formatted as 10.
Shipping	The total extended shipping charges for all items on the sales order. Repeated for each line on the pack slip. The total is zero if the order is flagged as a gift. Up to 7 positions, including a 2-place decimal. **Multiple pack slip for a purchase order?** If this is not the first pack slip for the purchase order, then shipping charges related to the prior shipment or to the purchase order as a whole are included in the first pack slip and not the current pack slip. There might be multiple pack slips for a purchase order if, for example, you put a line on hold before generating the first pack slip, then released the held line before generating the next pack slip. **Note:** A spreadsheet application such as Microsoft Excel might automatically remove the digits to the right of the decimal if they are set to .00; for example, an amount of $10.00 is formatted as 10.

Fields	Description
Handling	The total handling charges for all items on the pack slip, plus any additional charges. Repeated for each line on the pack slip. The total is zero if the order is flagged as a gift. Up to 7 positions, including a 2-place decimal. **Note:** A spreadsheet application such as Microsoft Excel might automatically remove the digits to the right of the decimal if they are set to .00; for example, an amount of $10.00 is formatted as 10.
Sales Tax	The total sales tax for the sales order. Includes any tax on freight. Repeated for each line on the pack slip. The total is zero if the order is flagged as a gift. Up to 7 positions, including a 2-place decimal. **Note:** A spreadsheet application such as Microsoft Excel might automatically remove the digits to the right of the decimal if they are set to .00; for example, an amount of $10.00 is formatted as 10.
Order Total	The total of all merchandise, shipping and handling, and sales tax. Repeated for each line on the pack slip. The total is zero if the order is flagged as a gift. Up to 11 positions, including a 2-place decimal. **Note:** A spreadsheet application such as Microsoft Excel might automatically remove the digits to the right of the decimal if they are set to .00; for example, an amount of $10.00 is formatted as 10.
Pay Type	The description of the payment method. Set to MULTI PAY if there is more than one payment method. Repeated for each line on the pack slip. Up to 30 positions.

Fields	Description
PO Messages	The sales order message lines, if any, flagged to print. Included for each item on the pack slip. Up to 255 positions (characters and spaces).
PO Gift Messages	The gift message lines, if any. Included for each item on the pack slip. Up to 255 positions (characters and spaces).
Brand Message	The pack slip message, if any, defined for the retailer's brand. Up to 255 positions (characters and spaces).
Line Customization	If the item requires customization, includes: • a code identifying the type of customization, such as monogramming, ink color, or script. Up to 15 positions. • the customization instructions themselves. Up to 45 positions.
Line Messages	Any order line messages from the sales order. Up to 255 positions (characters and spaces).
Gift Wrap	Set to Y if the item requires gift wrap; otherwise, set to N.

Integrated Shipping

Purpose: Use this screen to confirm shipment through an integrated shipping system.

Available when? This option is available only if the retailer has enabled shipping through an integrated system.

Other ways to confirm shipment:

- *Purchase Order Shipping Upload* screen
- *Purchase Order Shipping* screen
- *vendor integration*

Create invoice? You cannot create an invoice through this screen. To create an invoice, you can use the:

- *Purchase Order Shipping* screen if the retailer has enabled entry of an invoice number and you have the required authority
- *Invoice Creation* screen if you have the required authority
- *Invoice Upload* screen if you have the required authority

Pop-ups blocked? To open the window for printing the shipping label, you need to have pop-ups unblocked for the Vendor Portal in the browser, such as Chrome or Firefox, that you are using. Each browser has a different method for unblocking pop-ups for a particular web site. A search for "unblock pop-ups" with the name of your browser typically leads to instructions to unblock pop-ups for a particular web site, such as the Vendor Portal.

How to display: Select **Integrated Shipping** from the *Home Screen* or the **Purchase Order** drop-down menu if you have the required authority and if integrated shipping is enabled by the retailer.

Option	Procedure
select a pack slip for shipment	When you first advance to this screen, no purchase order is displayed. Enter a PO Number or Order Number, or both, to display the correct purchase order on the screen. If: • You enter an Order Number and there is more than one In Process purchase order for that order, the *Select Purchase Order* window opens. Use that window to select the correct purchase order. • You enter a PO Number and there is more than one In Process pack slip for that purchase order, the *Select Batch* window opens. Use that window to select the correct batch. **Case:** The **PO Number** and **Order Number** are not case-sensitive for searching; for example, an entry of `A` or `a` matches an order number of `A12345`. **Change requests?** The screen displays a message if there are any address change or cancellation requests pending for the selected pack slip. You should respond to these change requests, if at all possible, before confirming shipment. See the *Purchase Order Change Requests* screen for more information. **Same purchase order number listed twice?** It is possible for the same purchase order number to be listed more than once at the *Select Purchase Order* window if, for example, one of the items on the purchase order was on hold when you initially generated pack slips, and then you released the held line and generated a separate pack slip. In this situation, select either entry for the purchase order so you can confirm whether this is the pack slip you are shipping; you will first need to select a batch from the *Select Batch* window to display the pack slip details. If this is not the correct pack slip, click **Search** again.
enter or change the unit weight	Use the Unit Weight field for a purchase order line to enter a different weight. The total weight for the line is calculated by multiplying the unit weight by the Ship Qty.
change the shipment quantity	Use the Ship Qty to enter a quantity that is lower than the Print Qty. You can enter a quantity of 0 if the purchase order line is not included in the shipment.
select or change the ship via (carrier)	Use the Ship Via dropdown box to select a different carrier.

Option	Procedure
confirm shipment	After selecting a pack slip and changing any defaults, click **SHIP**. • The *Estimated Weight and Dimensions* window opens where you can define a Total Weight and Box dimensions. Once you define the total shipping weight and box dimensions, click **Save**. • If there are no errors, your browser's standard **Print** window opens with the shipping label. Print the label and close the **Print** window. If you did not confirm the entire pack slip for shipment, the pack slip information remains on the screen, with the Total Weight and Print Qty updated to reflect the remaining quantity. **For more information:** See *Troubleshooting integrated shipping*.

Fields	Description
Search fields You can use either the **PO Number** or the **Order Number** fields to select the purchase order for shipment.	
PO Number	Optionally, enter a valid purchase order number and click **Search** to confirm shipment of that purchase order. See *select a pack slip for shipment*, above, for more information. Not case-sensitive for searching; an entry of `A` or `a` matches a purchase order number of `A12345`.
Order Number	Optionally, enter a valid sales order number and click **Search** to confirm shipment of that sales order. See *select a pack slip for shipment*, above, for more information. Not case-sensitive for searching; an entry of `A` or `a` matches an order number of `A12345`.
PO HEADER	

Fields	Description
Ship To	The shipping address for the pack slip. Includes: • name: prefix (such as Mr. or Dr.), first name, middle name, last name, and suffix (such as Jr. or Esq.) • company name • first address line • apartment, unit, or suite number (prefixed by the label **Apt / Unit #:**) • address line 2 • address line 3 • address line 4 • city, state, postal or zip code, country code **Note:** Not all of the information above might be available for each customer. At a minimum, the shipping address must include: • first and last name or company • first address line • city, postal or zip code, and country code
PO Number	The number or code identifying the purchase order in the originating system.
Ship Via	The code and description identifying the preferred carrier to use for the purchase order. The carrier for the first item on the purchase order defaults. Optionally, you can use the dropdown box to select a different carrier.
Order Number	The number or code identifying the sales order in the originating system.
Shipping Instructions	The general shipping instructions for the order.
Batch ID	The number identifying the batch that includes the pack slip.
Total Weight	The current total extended weight for the items on the pack slip. Calculated by multiplying the current Unit Weight for each purchase order line by the current Ship Qty. Reduced when you confirm a partial shipment.
Search Results This area of the screen displays each purchase order line included on the pack slip. Only lines that are not currently held are listed. Optionally, you can change the Unit Weight, the Ship Qty, or both.	
Line #	The original purchase order line number for the shipment.
Item #	Your item number or code.
Retailer Item #	The retailer’s item number or code.
Item Description	The description of the item.

Fields	Description
Unit Weight	The shipping weight of each unit of the item. Defaults from the purchase order, but you can override the default. Your entry does not update the original purchase order line, but is used to calculate the shipping weight for the pack slip. When you confirm the shipment, the *Estimated Weight and Dimensions* window opens where you can also enter a shipping weight.
Print Qty	The quantity of the item printed on the pack slip. Reduced when you confirm a partial shipment.
Ship Qty	The total quantity of the item shipped. The **Print Qty** defaults, but you can override it to a lower quantity. If you confirm shipment for a lower quantity, the remaining **Print Qty** stays in In Process status after you confirm the shipment. You can confirm the shipment for the remaining quantity afterward, or you can use the *Void / Reprint Pack Slip* screen to void the remainder.

Issue	Possible Explanation or Solution
You closed the **Print** window without printing the shipping label	Use the shipping label icon ( ) at the **History** tab of the *Purchase Order* screen to open the label in your browser's **Print** window.
The **Print** window doesn't open	If pop-ups are blocked, the **Print** window doesn't open. Use an internet search to find the steps on unblocking pop-ups for the Vendor Portal in your browser (for example, search for "unblock pop-ups Chrome").
You confirmed shipment of a pack slip, and now the Vendor Portal screens are not responding to your entries	Confirm that the browser's **Print** window is not still open behind the current open browser window.
An error window indicates that a package weight is required	The integrated shipping system requires a total shipping weight that is higher than the current total. For example, the integrated shipping system requires a shipping weight of .10 or higher, and the current total is lower than .10.
An error window indicates that a box size is required	The integrated shipping system requires the box dimensions (length, width, and height). You can define the box dimensions on the *Estimated Weight and Dimensions* window.

Issue	Possible Explanation or Solution
An error window indicates an issue related to the shipping address	Notify the retailer about the error, including the error code or a screen capture if possible. The retailer can send an address update, or can instruct you to use another method to confirm shipment. **Non-U.S. shipping address:** If the error is related to a non-U.S. state, contact the retailer. You cannot currently use this screen to confirm shipment to a non-U.S. shipping address. **Address information sent:** The system sends the following shipping address information if it is defined: • First name, Last name • Company • First address line • Second address line: contains address line 2 and Apt/Suite • City, State/Province, Postal code, Country code • Phone: the system uses the following hierarchy to determine the phone number to pass: ship to day phone ship to eve phone sold to day phone sold to even phone originating location phone
An error window indicates an error with the ship via (carrier)	Use an alternate carrier of the same class if approved by the retailer.
An error window indicates an issue related to the shipper address or phone number, an invalid service, or any other type of error not related to the issues described above	Notify the retailer about the error, including the error code or a screen capture if possible.

Select Purchase Order

Purpose: Use this window to select a purchase order to confirm shipment through the *Integrated Shipping* screen.

Opens when? This window opens when you search by **Order Number** at the *Integrated Shipping* screen if there is more than one in process, unshipped purchase order for that order. This situation might occur if, for example, one of the lines on the sales order was held when purchase orders were originally generated, or if an additional line was added to the order at a later date or time.

Selecting the purchase order: The **PO Number** dropdown box lists each In Process purchase orders associated with the sales order. Highlight the correct purchase order and click **Save**. The purchase order information defaults to the *Integrated Shipping* screen. See that screen for more information.

Same purchase order number listed twice? It is possible for the same purchase order number to be listed more than once in the **PO Number** dropdown box if, for example, one of the items on the purchase order was on hold when you initially generated pack slips, and then you released the held line and generated a separate pack slip. In this situation, select either entry for the purchase order so you can confirm whether this is the pack slip you are shipping; you will first need to select a batch from the *Select Batch* window to display the pack slip details. If this is not the correct pack slip, click **Search** again at the **Integrated Shipping** screen.

Estimated Weight and Dimensions

Purpose: Use this window to enter the total shipping weight and the box dimensions of a package you are shipping through the *Integrated Shipping* screen.

Opens when? This window opens when you click **SHIP** at the **Integrated Shipping** screen.

Completing this window:

1. In the **Total Weight** field, enter the total shipping weight. The unit weight for each line defaults from the weight specified by the retailer, if any. You can also enter or change the unit weight for an item at the **Integrated Shipping** screen.The shipping weight can include decimals (for example, 1.1234).
2. In the **Box** field, define the dimensions of the box. The box flagged as the default by the retailer defaults if it is defined; otherwise, **Irregular Size** defaults. Select a predefined box size, or choose **Irregular Size** to manually define the **Length**, **Width**, and **Height** of the box. When manually defining the box dimensions, your entry must be a number between 0.01 and 999.99 with no more than two decimal places (for example, 10.55).
3. Click **Save**.

Rounding: The integrated system rounds the total shipping weight up to the nearest whole number if the shipping weight's decimal is .1 or higher (for example, 3.1 is rounded to 4); otherwise, the total shipping weight is rounded down to the nearest whole number (for example, 3.09 is rounded to 3).

For more information: See the *Integrated Shipping* screen for more information.

Purchase Order Change Requests

Purpose: Use the **Purchase Order Change Requests** screen to accept or decline requested address changes and cancellations for purchase orders that are currently in process or held.

In Process or Held status only: Change requests are displayed here only if the retailer submitted when any lines on the purchase order are:

- **In Process:** You have generated the pack slip; or,
- **Held:** You have used the *Purchase Order Maintenance* screen to put the line on hold

The Vendor Portal applies or rejects change requests automatically if the purchase order is in any other status. For example, if the purchase order is in **New Order** status, the change applies automatically; if the purchase order is already **Shipped** or **Canceled**, the change is rejected automatically. Also, if you ship a purchase order, the change request is rejected automatically.

Releasing a held line: If you use the *Edit Purchase Order Item* window or the *Purchase Order Maintenance* screen to release a line from hold and it returns to **New Order** status, the address change or cancellation applies automatically.

Void/reprint: You need to you use this screen to accept or decline any address change or cancellation requests before you use the *Void / Reprint Pack Slip* screen to reprint a pack slip. However, if you first use the *Void / Reprint Pack Slip* screen to void the pack slip, the address change or cancellation request is automatically applied; you can then reprint the pack slip from the *Select Purchase Orders* or *Purchase Order* screen if there are any uncanceled lines.

Vendor integration: Address change and cancellation requests are not sent to an integrated system through the *vendor integration*.

How to display this screen: Select **Purchase Order Change Requests** from the *Home Screen* or the **Purchase Orders** drop-down menu if you have the required authority.

Address changes for different lines on the purchase order: Even though an address change request is related for the purchase order as a whole, the Vendor Portal evaluates the status of the individual lines on the purchase order when determining whether to apply the change, reject it automatically, or submit it to you for review.

Example: When the retailer submits an address change, the purchase order is in **Open** status, with one line in **In Process** status and one line in **Shipped** status. You need to approve or reject the address change for the line in **In Process** status. The address change is automatically rejected for the line in **Shipped** status.

What if the retailer submits multiple address changes for the same purchase order? If the retailer submits a second or third address change for the same purchase order with a line in **In Process** or **Held** status before you have accepted or rejected the previously rejected change, the Vendor Portal automatically rejects the previous address change.

When are address change requests removed from the screen? An address change is no longer displayed here if you confirm shipment of the purchase order line without accepting or rejecting the change request, or if the address change applies automatically because you void the pack slip at the *Void / Reprint Pack Slip* screen.

Purchase order detail history for address changes: The Vendor Portal tracks address change history for each line at the *History tab* of the *Purchase Order* screen when the address change is:

- **automatically applied:** The *History tab* includes a record indicating when the address change was automatically applied to a line in **New Order** status. You can use the *Purchase Order History Detail* window to review the address change.
- **requested for an In Process or Held line:** The *History tab* includes a record indicating when the retailer requested an address change for a line in **In Process** or **Held** status. You can use the *Purchase Order History Detail* window to review the requested change.
- **accepted:** The *History tab* includes a record indicating when you:
  - accept an address change for a line in **In Process** or **Held** status
  - the change applies automatically because you release a line from hold at the *Purchase Order Maintenance* screen or the *Edit Purchase Order Item* window and the lines returns to **New Order** status

   - the change applies automatically when you void (but don't reprint) the pack slip at the *Void / Reprint Pack Slip* screen

     You can use the *Purchase Order History Detail* window to review the change.

- **rejected:** The *History tab* includes a record indicating when you rejected an address change for a line in **In Process** or **Held** status.

No history record is created when the Vendor Portal automatically rejects an address change request because the line is already in **Shipped** or **Canceled** status.

Unlike address change requests, cancellation requests are specific to a line on the purchase order. If the purchase order has multiple lines, the retailer needs to submit a separate cancellation request for each line to cancel the entire purchase order.

Cancellation requests are displayed at this screen only if the lines are in **In Process** or **Held** status. If the retailer submits a cancellation request for a line that is in:

- **New Order** status: the line is automatically canceled.
- **Shipped** or **Canceled** status: the cancel request is automatically rejected.

If you void a pack slip, this returns the purchase order line(s) to **New Order** status and the line is eligible to be automatically canceled. See the *Void / Reprint Pack Slip* screen for more information.

Purchase order detail history for cancellation requests: The Vendor Portal tracks cancellation history for each line at the *History tab* of the *Purchase Order* screen:

- **automatically canceled:** The *History tab* includes a record indicating when a line in **New Order** status was automatically canceled.
- **In Process or Held when the retailer requests cancellation:** The *History tab* includes a record indicating when the retailer requested cancellation of a line in **In Process** or **Held** status.
- **cancellation accepted:** The *History tab* includes a record indicating when you:
   - accept a cancellation for a line in **In Process** or **Held** status
   - the cancellation applies automatically because you release a line from hold at the *Purchase Order Maintenance* screen or the *Edit Purchase Order Item* window and the lines returns to **New Order** status
   - the cancellation applies automatically when you void (but don't reprint) the pack slip at the *Void / Reprint Pack Slip* screen

     You can use the *Purchase Order History Detail* window to review the change.
- **cancellation rejected:** The *History tab* includes a record indicating when you rejected a cancellation request for a line in **In Process** or **Held** status, including when you confirm shipment of the line.
- **cancellation automatically rejected:** The *History tab* includes a record indicating when retailer sends a cancellation request for a line that is already in **Shipped** or **Canceled** status.

Option	Procedure
search for and display requested address changes for purchase orders	When you first advance to this screen, no purchase orders or lines are displayed and the *Address Changes* option is selected by default. Click **Search** to display all address change requests, or optionally enter any of the *Search fields* before clicking **Search**.
search for and display requested cancellation requests for purchase orders	When you first advance to this screen, no purchase orders are displayed and the *Address Changes* option is selected by default. Select the *Cancellations* option and click **Search** to display all cancellation requests, or optionally enter any of the *Search fields* before clicking **Search**. **Case:** The **PO Number** and **Order Number** are not case-sensitive for searching; for example, an entry of `A` or `a` matches an order number of `A12345`.
accept or decline one or more change (address change or cancellation) requests	Select the **Accept** or **Decline** option for one or more address change or cancellation requests and click **Update**. Optionally, you can click the **Accept** or **Decline** box at the top of the column and click **Update** to accept or decline all listed addresses changes or cancellations. **Retailer notified:** The retailer receives a notification email when you accept or decline any address change or cancellation requests.
review a requested address change	Click the display icon () to open the *Purchase Order Address Change Request* window. This window displays additional information about the address change request, including the current ship-to address and the proposed new address.
advance to purchase order inquiry	Click the edit/display icon () labeled **PO Inquiry** to advance to the *Purchase Order* screen, where you can review additional information about the purchase order.

Fields	Description
Search fields	
View Results By	Select: • **Address Changes** and click **Search** to display address change requests submitted by the retailer • **Cancellations** and click **Search** to display cancellation requests submitted by the retailer

Fields	Description
Order Status	**Address change requests only:** Optionally, select an order status and click **Search** to display address changes for orders in that status. Possible statuses are: • **Held:** You have held the line(s) on the purchase order from processing. You might put a line on hold if you cannot fulfill it, and are requesting that the retailer cancel it. When a line on a purchase order is on hold, it is not eligible for pack slip generation; or, if a pack slip has already been generated, the line is not eligible for shipment confirmation. • **In Process:** You have generated pack slips for the purchase order or line. • **Open (multi-line purchase orders only):** The purchase order includes more than one line, and the line statuses include at least one line that is **Held**, **In Process**, or **New Order**.
Line Status	**Cancel requests only:** Optionally, select a line status and click **Search** to display cancellation requests for lines in that status. Possible statuses are: • **Held:** You have held the line from processing. You might put a line on hold if you cannot fulfill it, and are requesting that the retailer cancel it. When a line on a purchase order is on hold, it is not eligible for pack slip generation; or, if a pack slip has already been generated, the line is not eligible for shipment confirmation through the *Purchase Order Shipping* screen. • **In Process:** You have generated a pack slip for the line.
PO Number	Optionally, enter a full or partial number or code identifying the purchase order in the originating system to display purchase orders whose numbers start with your entry. Up to 30 positions. Not case-sensitive for searching; an entry of `A` or `a` matches a purchase number of `A12345`.
Order Number	Optionally, enter a full or partial number or code identifying the sales order in the originating system to display purchase orders whose sales order number starts with your entry. Up to 30 positions. Not case-sensitive for searching; an entry of `A` or `a` matches an order number of `A12345`.
Totals A table at the upper right displays the total number of pending address change and cancellation requests. Click **Search** to update these totals.	
Address Changes	The total number of held, in process, or open purchase orders that have pending address change requests from the retailer.
Cancellations	The total number of lines on purchase orders that have pending cancellation requests from the retailer.

Fields	Description
Result fields You cannot work with both address change requests and cancellation requests at the same time. Use the **Address Changes** and **Cancellations** options at the top of the screen to switch between the two types of requests.	
Accept	Select this box and click **Update** to accept the address change or cancellation. You can also select the box at the top of the column and click **Update** to accept all listed addresses changes or cancellations. **Retailer notified:** The retailer receives a notification email when you accept or decline any address change or cancellation requests.
Decline	Select this box and click **Update** to decline the address change or cancellation. You can also select the box at the top of the column and click **Update** to decline all listed addresses changes or cancellations. **Retailer notified:** The retailer receives a notification email when you accept or decline any address change or cancellation requests.
PO Number	The number or code identifying the purchase order in the originating system. Address change requests apply to all unshipped lines on the purchase order, while cancellation requests are specific to a line on the purchase order.
Line #	**Cancel requests only:** The line number identifying the line on the purchase order.
Order Number	The number or code identifying the sales order in the originating system.
Customer Ship To	The name from the shipping address on the purchase order, including the customer's first and last name, or the company name, or both.
Item #	**Cancel requests only:** Your item number or code. Hold the pointer over the **Item #** to display a description of the item and the retailer's item number or code.
Request Date	The date when the address change or cancellation request was submitted.
Due Date	**Address change requests:** The earliest date when a line on the purchase order is due. If you have revised any of the due dates at the *Purchase Order Maintenance* screen, this is based on the revised due date. **Cancellation requests:** The date when the line is due. If you have revised the due date at the *Purchase Order Maintenance* screen, this is the revised due date.

Fields	Description
Order Status	**Address change requests only:** Possible statuses are: • **Held:** You have held the line(s) on the purchase order from processing. You might put a line on hold if you cannot fulfill it, and are requesting that the retailer cancel it. When a line on a purchase order is on hold, it is not eligible for pack slip generation; or, if a pack slip has already been generated, the line is not eligible for shipment confirmation through the *Purchase Order Shipping* screen. • **In Process:** You have generated pack slips for the purchase order or line. • **Open (multi-line purchase orders only):** The purchase order includes more than one line, and the line statuses include at least one line that is **Held**, **In Process**, or **New Order**.
Line Status	**Cancel requests only:** Possible statuses are: • **Held:** You have held the line from processing. You might put a line on hold if you cannot fulfill it, and are requesting that the retailer cancel it. When a line on a purchase order is on hold, it is not eligible for pack slip generation; or, if a pack slip has already been generated, the line is not eligible for shipment confirmation through the *Purchase Order Shipping* screen. • **In Process:** You have generated a pack slip for the line.
Display	**Address change requests only:** Click the display icon ( ) to open the *Purchase Order Address Change Request* window. This window displays additional information about the address change request, including the current ship-to address and the proposed new address.
PO Inquiry	Click the edit/display icon ( ) labeled **PO Inquiry** to advance to the *Purchase Order Inquiry* screen, where you can review the details of the purchase order, such as the sold-to and ship-to address, items, history, and messages.

Purchase Order Address Change Request

Purpose: Use the **Purchase Order Address Change Request** window to review a pending address change requested by the retailer when a line is in **In Process** or **Held** status.

For more information: See the *Purchase Order Change Requests* screen, especially *About Address Change Requests*.

How to display this window: Select the icon ( ) in the **Display** column for an address change at the *Purchase Order Change Requests* screen if you have the required authority.

Field	Description
Purchase Order #	The number or code identifying the purchase order in the originating system.
Order Status	Possible statuses are: • **Held:** You have held the line(s) on the purchase order from processing. You might put a line on hold if you cannot fulfill it, and are requesting that the retailer cancel it. When a line on a purchase order is on hold, it is not eligible for pack slip generation; or, if a pack slip has already been generated, the line is not eligible for shipment confirmation through the *Purchase Order Shipping* screen. • **In Process:** You have generated pack slips for the purchase order or line. • **Open (multi-line purchase orders only):** The purchase order includes more than one line, and the line statuses include at least one line that is **Held**, **In Process**, or **New Order**.
Sales Order #	The number or code identifying the sales order in the originating system.
Batch ID	The batch number assigned when you generated the pack slip. Blank if you have not generated a pack slip.
Brand	The retailer's brand that is associated with the sales order.
Sold to Change	Indicates whether the sold-to address for the purchase order is the same as the shipping address, so the retailer is requesting that both addresses be changed. Possible settings: • **Yes** = update both the sold-to address and the ship-to address • **No** = update the ship-to address only
Old Ship To	The ship-to name and address before applying the change. Includes: • name: prefix (such as Mr. or Dr.), first name, middle name, last name, and suffix (such as Jr. or Esq.) • company name • first address line • apartment, unit, or suite number (prefixed by the label **Apt / Unit #:**) • address line 2 • address line 3 • address line 4 • city, state, postal or zip code, country code • daytime phone number (prefixed by the label **Day:**) • evening phone number (prefixed by the label **Eve:**) • email address **Note:** Not all of the information above might be available for each customer.
New Ship To	The ship-to name and address with the changes indicated in red. Includes the same name and address fields as the **Old Ship To**.

Purchase Order Shipping

Purpose: Use the **Purchase Order Shipping** screen to confirm shipment of one or more pack slips for purchase orders.

If multiple items are included on a pack slip: You can use the *Purchase Order Shipping Details* window to confirm shipment of individual line items on a pack slip, or enter a separate tracking number, weight, rate, or shipment date for individual units or lines. Select the **Ship by Line** option on this screen to open the window. This option is not available if the pack slip includes just a single unit of one line item.

Even if a pack slip includes multiple line items, you can also confirm shipment for the entire pack slip at the **Purchase Order Shipping** screen; it is not necessary to confirm shipment for each item separately.

If the purchase order has multiple pack slips: It is possible for you to generate more than one pack slip for a purchase order if, for example, you put an item on hold before generating pack slips, then release the item from hold before generating pack slips again. In this situation, you need to confirm shipment of each pack slip separately.

Change requests? The screen displays a message if there are any address change or cancellation requests pending for any of the generated pack slips. You should respond to these change requests, if at all possible, before confirming shipment. See the *Purchase Order Change Requests* screen for more information.

Invoice entry? Depending on how the retailer has set the **Uses Invoicing** preference, the **Require Invoice # at Shipping** preference, and your authority, entry of an invoice number can be optional, required, or not supported.

> **Note:**
>
> If entry of an invoice number is required at shipment confirmation, but you do not have authority to invoice creation, you cannot confirm shipments.

Other ways to confirm shipments:

- *Integrated Shipping* screen
- *Purchase Order Shipping Upload* screen
- *vendor integration*

How to display this screen: Select **Purchase Order Shipping** from the *Home Screen* or the **Purchase Orders** drop-down menu if you have the required authority.

Option	Procedure
search for generated pack slips	When you first advance to this screen, no pack slips are displayed. This screen can display a maximum of 500 generated pack slips. To display all generated, unconfirmed pack slips, click **Search**. Otherwise, use any of the *Search fields*> and then click **Search** to restrict the displayed pack slips to those that match your selection(s). **Note:** Clicking **Search** clears any entries or selections you have made in the *INVOICE HEADER* or *Search Results fields*. **Case:** The enterable fields are not case-sensitive for searching; for example, an entry of `A` or `a` matches an order number of `A12345`.

<table>
<tr><th>Option</th><th>Procedure</th></tr>
<tr><td>Confirm shipment of one or more pack slips without creating an invoice</td><td>To confirm shipment of one or more pack slips:
For each pack slip you are confirming:
• Select the pack slip from the Search Results fields.

Note:
When you select a pack slip, the current date defaults to the Ship Date. If you select all pack slips, the current date defaults for all pack slips. Optionally, you can override this default for any selected pack slips; however, the Ship Date cannot be earlier than the purchase order’s Date Created.

• Optionally, override the default Carrier for the pack slip, or select a carrier if there is no default. To quickly select a carrier, enter the first letters of the carrier name while the cursor is in the Carrier field.
If the carrier doesn’t default: The Carrier field is blank if the carrier specified for the purchase order is not currently assigned to you as an active carrier. Notify the retailer if this occurs.
• Enter the Tracking #, Weight, and Rate. The retailer’s settings for the carrier control whether these fields are required or optional.
• Optionally, you can also Confirm shipment by line or unit, or enter separate information for each line or unit for individual pack slips. After you complete the Purchase Order Shipping Details window and click Save, you return to the Purchase Order Shipping screen. You can no longer enter shipment information for the pack slip that you updated until you submit the shipment or exit the screen.
• Click SHIP.
For more information: See Shipping updates, below.</td></tr>
</table>

Option	Procedure
Confirm shipment of one or more pack slips and create an invoice	To confirm shipment of one or more pack slips and create an invoice to submit to the retailer: • **Enter invoice?** If: the **Require Invoice # at Shipping** preference at the *Vendor Configuration* screen is selected and: you have authority to create an invoice, you need to enter an *Invoice #* to associate with the shipment of all selected pack slips. you do not have authority to create an invoice, you cannot confirm shipment of any pack slips. Contact the retailer for assistance. the **Require Invoice # at Shipping** preference at the *Vendor Configuration* screen is not selected and you have authority to create an invoice, you can enter an *Invoice #*, but it is not required to confirm shipment. **Note:** If you do not have authority to enter an invoice, or if the **Uses Invoicing** preference is not selected, the *Invoice #* field is not available for entry. See the *Invoice #* field, below, for more information. • Continue with the steps above under *Confirm shipment of one or more pack slips without creating an invoice* to confirm shipment. • If you entered an invoice number, the *Create Invoice Confirmation* window opens. See that window for more information on creating invoices. **For more information:** See *Shipping updates*, below.

Option	Procedure
Confirm shipment by line or unit, or enter separate information for each line or unit	Regardless of whether you have already entered an invoice number or selected pack slips as described above under *Confirm shipment of one or more pack slips without creating an invoice*, you can click the *Ship by Line* icon ( ) to open the *Purchase Order Shipping Details* window. You can use this window to confirm shipment of individual lines or partial quantities of lines. After you complete the *Purchase Order Shipping Details* window and click **Save**, you return to the **Purchase Order Shipping** screen. You can no longer enter shipment information for the pack slip that you updated until you submit the shipment or exit the screen. At this screen, you can: • use the *Purchase Order Shipping Details* window to confirm shipment by line or unit for additional pack slips • confirm entire pack slips, using the steps described above under *Confirm shipment of one or more pack slips without creating an invoice* • click **SHIP**. If you entered an invoice number, the *Create Invoice Confirmation* window opens. See that window for more information on creating invoices. **For more information:** See *Shipping updates*, below. **Note:** If you need to generate an additional pack slip for the remaining quantity of a line, you should first use the *Void / Reprint Pack Slip* screen to reprint the pack slip with the currently available quantity, and then after you confirm shipment of this quantity, generate a new pack slip for the remaining quantity. Using this method prevents the second pack slip from listing the totals twice, potentially confusing the customer.
advance to purchase order inquiry	Click the edit/display icon ( ) labeled **PO Inquiry** to advance to the *Purchase Order* screen, where you can review additional information about the purchase order.

When you confirm shipment of one or more full or partial pack slips, the Vendor Portal:

- updates the shipped quantity of each line
- writes a purchase order line history record with:

- the current date (not necessarily the *Ship Date*)
- your **User** ID
- a **Source** of **UI**
- an **Action Type** of **Shipment**
- **Transaction Notes** indicating the ship date, carrier code, tracking number, weight, and freight rate, for example: `Ship Date: 07/17/2013, Carrier: 50, Tracking #: Track12155, Weight: 2.34, Rate: $ 1.23`

- changes the status of shipped lines to **Shipped** if all units are shipped or canceled; otherwise, the status remains **In Process**
- changes the status of the purchase order to **Shipped** if all lines are shipped; otherwise, the status of the purchase order is **Open** if any units are unshipped, or **Complete** if all units are either shipped or canceled
- automatically cancels any pending cancellation requests if the entire purchase order line quantity is shipped
- automatically cancels any pending address change requests if the entire purchase order is shipped

What if the entire line quantity is not shipped? It is possible that confirming shipment does not change the entire purchase order line quantity to shipped if:

- You use the *Purchase Order Shipping Details* to enter a partial shipment quantity. In this case, the remaining quantity on the line remains in **In Process** status.

  This result can also occur if you use the *Purchase Order Shipping Upload* screen or the *vendor integration* to confirm a partial quantity.
- You have previously used the *Void / Reprint Pack Slip* screen to change the printed quantity for a line, and then confirm shipment of the entire current printed quantity. In this case, the remaining quantity on the line goes into **New Order** status. If there are any pending address change or cancellation requests, they apply automatically; however, if the quantity specified for a cancellation request exceeds the current quantity on the line, the cancel request is automatically rejected.

Creating an invoice: See the *Create Invoice Confirmation* window for more information.

Fields	Description
Search fields You can use any of the search fields, alone or in combination, to restrict the pack slips displayed in the *Search Results fields*.	
Batch ID	Optionally, select a batch ID from the drop-down list and click **Search** to display unconfirmed pack slips for that batch only. Batch IDs are included in the drop-down list only if they include at least one pack slip for which you have not fully confirmed shipment.
PO Number	Optionally, enter a full or partial purchase order number and click **Search** to display unconfirmed pack slips for the purchase order only. Not case-sensitive for searching; an entry of `A` or `a` matches a purchase order number of `A12345`.

Fields	Description
Order Number	Optionally, enter a full or partial number or code identifying the sales order in the originating system to display unconfirmed pack slips whose sales order number starts with your entry. Up to 30 positions. Not case-sensitive for searching; an entry of `A` or `a` matches an order number of `A12345`.
Date Generated	Optionally, select a date from the calendar control and click **Search** to display unconfirmed pack slips that you generated on that date or later.
Item #	Optionally, enter a full or partial item number and click **Search** to display unconfirmed pack slips that include unshipped items matching your entry. Not case-sensitive for searching; an entry of `A` or `a` matches an item number of `A12345`.
Carrier	Optionally, select a carrier from the drop-down list and click **Search** to display unconfirmed pack slips who are currently assigned to that carrier. To quickly select a carrier, enter the first letters of the carrier name while the cursor is in the **Carrier** field. Only carriers that are assigned to you by the retailer and that are flagged as **Active** are available for selection.
Country	Optionally, select a country from the drop-down list and click **Search** to display unconfirmed pack slips whose shipping addresses are in that country.
State	Optionally, after selecting a country from the **Country** drop-down list, select a state, province, or territory from the **State** drop-down and click **Search** to display unconfirmed pack slips whose shipping addresses are in that state, province, or territory.
Outstanding Pack Slips table **Includes only In Process items:** This table includes purchase order lines that are in **In Process** status. **To update the information in this summary table:** Updating the information in this table requires you to discard any entries you have made but not yet submitted. To update, exit the screen and re-enter it, or click **Search**. **Excludes canceled items or purchase orders:** The totals in this table exclude any items or entire purchase orders whose cancellation has been confirmed. **Excludes held items:** The totals in this table exclude any items or entire purchase orders that you have put on hold.	
POs	The total number of purchase orders that include pack slips eligible for shipment confirmation. A single purchase order can include multiple pack slips if, for example, you held an item before generating the first pack slip, then released the item and generated an additional pack slip. In this situation, each pack slip for the purchase order is assigned to a different batch.
Units	The total number of units of all items included on pack slips and eligible for shipment confirmation.
Dollars	The total of the selling unit prices of all items included on pack slips and eligible for shipment confirmation. Includes a two-position decimal.

Fields	Description
Batches	The total number of batches that include pack slips eligible for shipment confirmation.
INVOICE HEADER	
Invoice #	The invoice number or code to submit to the retailer for the shipment of the selected pack slip(s). **Displayed when?** This field is displayed if the **Uses Invoicing** preference is selected at the *Vendor Configuration* screen. **Enterable?** You need authority to the **Create Invoices** feature to enter an invoice number. **Required?** This field is required if the **Require Invoice # at Shipping** preference is selected at the *Vendor Configuration* screen. **Note:** If the **Require Invoice # at Shipping** preference is selected but you do not have authority to the **Create Invoices** feature, you cannot confirm shipment of any pack slips. Contact the retailer for assistance. **Validation:** Your entry can consist of numbers, letters, and special characters, and must: • not be a duplicate of another invoice from you for the retailer • not exceed the maximum length specified by the retailer If you specify an invoice number, the *Create Invoice Confirmation* window opens when you click **SHIP**. See that window for more information on creating an invoice.
Search Results fields Use the results fields to select each pack slip that you are confirming as shipped. See the field descriptions below for required and optional information for each shipment.	
Batch ID	The number assigned by the Vendor Portal to identify a group of pack slips generated at the same time and for the same brand. A batch can include a single pack slip. Batch numbers are not necessarily sequential.
PO Number	The number or code identifying the purchase order in the originating system.
Order Number	The number or code identifying the sales order in the originating system.

Fields	Description
Carrier	The carrier delivering the shipment to the customer. The carrier specified by the originating system defaults unless the retailer has flagged the carrier as inactive. Optionally, you can override the default carrier by selecting a different carrier from the drop-down list. Only carriers assigned to you by the retailer and that are flagged as **Active** are available for selection. Required. To quickly select a carrier, enter the first letters of the carrier name while the cursor is in the **Carrier** field. **Note:** Optionally, you can use the *Purchase Order Shipping Details* window to confirm shipment of individual units or lines by different carriers. See that window for more information.
Tracking #	The tracking number assigned by the carrier to trace the shipment. The originating system may include the tracking number in an email to the customer. The retailer specifies whether a tracking number is required for each carrier. **Note:** Optionally, you can use the *Purchase Order Shipping Details* window to enter a separate tracking number, weight, rate, or shipment date for individual units or lines. See that window for more information.

Fields	Description
Weight	The shipping weight of the package. Can include a two-position decimal (for example, 12.34). The retailer specifies whether the weight is required for each carrier. **Note:** Optionally, you can use the *Purchase Order Shipping Details* window to enter a separate tracking number, weight, rate, or shipment date for individual units or lines. See that window for more information.
Rate	The rate for shipping the package. Can include a two-position decimal (for example, 12.34). The retailer specifies whether the rate is required for each carrier. **Note:** Optionally, you can use the *Purchase Order Shipping Details* window to enter a separate tracking number, weight, rate, or shipment date for individual units or lines. See that window for more information.
Ship Date	The date when the shipment occurred. The current date defaults when you select a pack slip for shipment, but you can use the calendar control to override the default. Cannot be earlier than the purchase order's **Date Created**. Required. **Note:** Optionally, you can use the *Purchase Order Shipping Details* window to enter a separate tracking number, weight, rate, or shipment date for individual units or lines. See that window for more information.

Fields	Description
Ship by Line	Click the **Ship by Line** icon ( ) to open the *Purchase Order Shipping Details* window. You can use this window to confirm shipment of individual lines or partial quantities of lines. This icon is displayed only if there is more than one unshipped unit on the pack slip.
PO Inquiry	Click the PO Inquiry icon ( ) to advance to the *Purchase Order Inquiry* screen, where you can review the details of the purchase order, such as the sold-to and ship-to address, items, history, and messages.

Purchase Order Shipping Details

Purpose: Use the **Purchase Order Shipping Details** window to confirm shipment of individual lines or units on a pack slip. Only lines and units in **In Process** status are available for confirmation at this window.

> **Note:**
>
> If you need to generate an additional pack slip for the remaining quantity of a line, you should first use the *Void / Reprint Pack Slip* screen to reprint the pack slip with the currently available quantity, and then after you confirm shipment of this quantity, generate a new pack slip for the remaining quantity. Using this method prevents the second pack slip from listing the totals twice, potentially confusing the customer.

How to display this screen: Select the **Ship by Line** icon ( ) for a purchase order at the *Purchase Order Shipping* screen if you have the required authority. This icon is displayed only if there is more than one unshipped unit on the pack slip.

Option	Procedure
select an individual line for shipment confirmation	• Enter the required and any optional information for the shipped line. See the *Fields at this screen* below for more information. • For each additional line whose shipment you are not confirming at this time, position the cursor in the *Units To Ship* field and change the entry to zero (0). • Click **Save**. • When you return to the *Purchase Order Shipping* screen, you can select additional pack slips for shipment confirmation or click **SHIP** to confirm the shipment. See the *Purchase Order Shipping* screen for more information on shipping updates.

Option	Procedure
select a partial quantity of a line for shipment confirmation	• Position the cursor in the *Units To Ship* field and change the entry to the quantity shipping at this time. The window adds a new line, below, with the remaining quantity of the line. The carrier on the new line defaults from the line whose quantity you changed. • If you are not confirming the remaining quantity of the line, position the cursor in the *Units To Ship* field for the new line and change the entry to zero (0). • Click **Save**. • Optionally, when you return to the Purchase Order Shipping screen, select additional pack slips for shipment confirmation. • At the *Purchase Order Shipping* screen, click **SHIP** to confirm the shipment. See the *Purchase Order Shipping* screen for more information on shipping updates.
select different carriers or enter a different tracking number, weight, rate, or shipment date for each item	• Enter the required and any optional information for each shipped line. See the *Fields at this screen* below for more information. • Click **Save**. • When you return to the *Purchase Order Shipping* screen, you can select additional pack slips for shipment confirmation or click **SHIP** to confirm the shipment. See the Purchase Order Shipping screen for more information on shipping updates.

Fields	Description
Summary fields	
Purchase Order Number	The number or code identifying the purchase order in the originating system.
Brand	The retailer’s brand that is associated with the sales order.
Sales Order Number	The number or code identifying the sales order in the originating system.
Batch ID	The number assigned by the Vendor Portal to identify a group of pack slips generated at the same time and for the same brand. A batch can include a single pack slip. Batch numbers are not necessarily sequential.
For each unshipped item on the pack slip:	
Line #	The line number identifying the item on the purchase order.
Item #	Your item number or code.
Units Picked	The total number of units included on the pack slip and available to ship. Updated when you change the **Units To Ship**; see below.

Fields	Description
Units To Ship	The total number of units that you are confirming as shipped. Defaults to the **Units Picked**. Optionally, you can: • enter a number of units lower than the default if you are confirming a partial shipment of the purchase order line. See *select a partial quantity of a line for shipment confirmation*, above. • enter zero (0) if you are confirming a different line for shipment, but not this line. See *select an individual line for shipment confirmation*, above. You cannot enter a number higher than the **Units Picked**.
Carrier	The carrier to deliver the shipment to the customer. The carrier specified by the originating system defaults unless the retailer has flagged the carrier as inactive. Optionally, you can override the default carrier by selecting a different carrier from the drop-down list. Only carriers currently flagged as **Active** by the retailer are available to select. To quickly select a carrier, enter the first letters of the carrier name while the cursor is in the **Carrier** field. Required.
Tracking #	The tracking number assigned by the carrier to trace the shipment. The originating system may include the tracking number in an email to the customer. The retailer specifies whether a tracking number is required for each carrier.
Weight	The shipping weight of the package. Can include a two-position decimal. The retailer specifies whether the weight is required for each carrier.
Rate	The rate for shipping the package. Can include a two-position decimal (for example, 12.34). The retailer specifies whether the weight is required for each carrier.
Ship Date	The date when the shipment occurred. The current date defaults, but you can use the calendar control to override it. Cannot be earlier than the purchase order's **Date Created**. Uses your local time zone, rather than the retailer's time zone, to determine the current date. Required.

Purchase Order Shipping Upload

Purpose: Use the **Purchase Order Shipping Upload** screen to upload a CSV (comma-separated value) file containing shipment confirmations for items on purchase orders.

Other ways to confirm shipments:

- *Integrated Shipping* screen
- *Purchase Order Shipping* screen
- *vendor integration*

Eligible purchase order lines: You can use the shipping upload CSV file to confirm shipment of a full or partial quantity of a purchase order line that is not already shipped or canceled, as long as the line's status is currently **In Process**, **New Order**, or **Held**.

> **Note:**
>
> When you use the *Purchase Order Shipping* screen to confirm shipments, a line is eligible for confirmation only if its status is **In Process**.

Create invoice? You cannot create an invoice through uploading the CSV file. To create an invoice, you can use the:

- *Purchase Order Shipping* screen if the retailer has enabled entry of an invoice number and you have the required authority
- *Invoice Creation* screen if you have the required authority
- *Invoice Upload* screen if you have the required authority

Multiple files? Some browsers support uploading multiple files at the same time; however, you might not receive an error email or be able to review all errors when uploading multiple files. To make sure you understand any errors that might occur, upload the files one at a time.

How to display this screen: Select **Purchase Order Shipment Upload** from the *Home Screen* or the **Purchase Orders** drop-down menu if you have the required authority.

To confirm one or more shipments by uploading a CSV file at this screen:

- Click the **Choose Files** or **Browse...** button.
- Select the file to upload. Your selection must have a CSV extension (for example, MYSHIPMENTS.CSV).

> **Note:**
>
> To make sure that you can review any errors that might occur, you should not upload more than one CSV file at a time, even if your browser supports it. Otherwise, the *Invoice Upload - Errors* might not be available, and the notification email might not be generated. Also, there needs to be a carriage return after each line in the file.

- Click **Upload**.
- Click **Refresh** to see if the shipment confirmation was successful or if there are any errors, as indicated by the *Status* field.

If successful: See *Shipping updates* for a summary of the updates that take place for successful shipment uploads.

If unsuccessful: For each record in the CSV file that includes an error, the Vendor Portal flags the first error it finds and displays the upload error icon ( ) in the **Errors** column. Click the icon to open the *Purchase Order Shipping Upload - Errors* window and review the error(s). See that window for more information.

The Vendor Portal also generates an email notification to the retailer and to the **Upload Error Notification** email address specified at the *Vendor Configuration* screen. The email includes information about the data in error.

Contents of the file: Each CSV file should contain the following unlabeled fields in the order indicated below. Each value should be separated from the next by a comma. You can generate a CSV file in a spreadsheet application and then choose to save the spreadsheet in CSV format.

Sample file: A sample file might be formatted as follows:

093015AB,1,ordernumber,1,1.23,2.34,Track2016010502,1,EA,20160602

2016010504,1,SO2016010504,51,1.11,2.22,Track2016010504,1,EA,20160426

Field	Description
A: PO Number	Required.
B: Line Number	Required.
C: Order Number	Informational only. No validation. Optional.
D: Carrier Code	The code identifying the carrier shipping the package. Must be a valid code for a carrier assigned to you by the retailer. Assigned carriers are displayed at the **Carriers** tab of the *Vendor Configuration* screen. Does not need to be flagged as **Active**. Required.
E: Freight Rate	Required, but can be set to zero (0) if the carrier does not require a freight rate. Numeric, rounded to 2 decimal places.
F: Weight	Required, but can be set to zero (0) if the carrier does not require weight. Numeric, rounded to 2 decimal places.
G: Tracking Number	The tracking number that the customer can use to track the shipment. Required if a tracking number is required for the carrier.
H: Quantity Shipped	Must not be greater than the current unshipped, uncanceled, printed quantity. Required.
I: Unit of Measure	Informational only. No validation. Required.
J: Ship Date	Can be a future or past date, or the current date; but cannot be earlier than the purchase order's **Date Created**. Must be entered in the correct format for your locale (as defined at the *Vendor Configuration* screen). Required.

Fields	Description
Date	The date and time when you uploaded the CSV file to confirm shipment(s). The date and time might not be your local date and time, if the retailer uses a server in a different time zone. For example, if your store location is on Eastern Standard time, and the retailer uses a server that is on Pacific time, the date and time displayed might be earlier than the current time in your location.

Fields	Description
Status	The status of the upload: • **Completed:** The Vendor Portal processed all the shipment updates specified in the CSV file. • **Completed with Errors:** You uploaded just one CSV file at a time, and one or more shipment updates specified in the file contained errors. Click the upload error icon ( ) to open the *Purchase Order Shipping Upload - Errors* window and review the errors. • **Failed:** You uploaded more than one CSV file at a time, and one or more shipment updates specified in the file contained errors. Upload the files one at a time so that you can review the errors. • **Uploaded:** You have just uploaded the file and it is currently processing. The file stays in this status briefly until processing completes. If it stays in this status, contact the retailer to confirm that the upload folder has been created correctly.
File Name	The name of the CSV file that you uploaded.
User ID	The user ID of the person who uploaded the file.
Errors	The upload errors icon ( ) indicates that one or more records in the CSV file was incorrect. Click the icon to open the *Purchase Order Shipping Upload - Errors* window. See that window for more information. **Note:** If you upload more than one file at a time, you might not be able to review errors at the *Purchase Order Shipping Upload - Errors* window and the email might not be generated. Upload the files one at a time so that you can review all errors.

Purchase Order Shipping Upload - Errors

Purpose: Use the **Purchase Order Shipping Upload - Errors** window to display the errors that occurred when you uploaded shipment information for one or more purchase order lines in a comma-separated value file.

How to display this screen: Select the error icon ( ) at the *Purchase Order Shipping Upload* screen.

The following table describes possible shipping upload errors.

> **Note:**
>
> You might not be able to review errors if you upload multiple files at one time.

Error Code	Error Description	Explanation
3031	Invalid PO (724q) is not associated to vendor (11).	The purchase order number specified is not a valid purchase order number for the vendor.
3032	Invalid Carrier (0) is not associated to vendor (257).	The carrier code specified is not a valid carrier assigned to you by the retailer.
3033	Tracking Number is a required field.	No tracking number is specified, and the retailer specifies that a tracking number is required for the carrier.
3034	Shipping Weight is a required field.	The actual weight specified is 0, and the shipping weight is required for the carrier.
3035	Shipping Rate is a required field.	The meter charges specified is 0, and shipping rate is required for the carrier.
3037	Ship Date is invalid, ship date cannot be before create date.	The shipment date is earlier than the **Date created** for the purchase order.
3038	Carrier is a required field.	No carrier code is specified.
3042	Invalid PO Line (99) is not associated to PO (383).	There is no matching line number on the specified purchase order. This error also occurs if the line number specified is zero.
3043	Invalid Qty, shipped quantity.	The shipped quantity specified is zero or negative.
3044	Invalid Qty, shipped quantity cannot exceed the available to ship.	The quantity specified in the upload file exceeds the current unshipped, uncanceled quantity for the line.
3046	Invalid Qty, shipped quantity cannot exceed the printed quantity.	The quantity specified in the upload file exceeds the current unshipped, printed quantity for the line.
3050	Invalid PO Lines provided.	The purchase order line is not an open line on the purchase order.
none	Invalid freight:	No freight rate is specified, or the freight rate specified is not numeric.
	Invalid PO line number:	No line number is specified.
	Invalid ship date:	The ship date specified was 0, or the date was not formatted correctly.
	Invalid weight:	No weight is specified, or the weight specified is not numeric.
	Invalid # of data columns.	Can occur if the columns are not the same as those in the *Fields in the Shipping Upload CSV File*, described at the *Purchase Order Shipping Upload* , or if no date is specified.

Error Code	Error Description	Explanation
	Miscellaneous error java.lang.StringIndexOutOfBoundsException: String index out of range: 4	The date specified is zero (0) or non-numeric.

4
Invoice Menu

Invoice Creation

Purpose: Use the **Invoice Creation** screen to create invoices to send to the retailer for shipments.

Other ways to create invoices: You can also create invoices by:

- using the *Invoice Upload* screen to upload a CSV (comma-separated value) file containing the invoice information, or
- specifying an **Invoice #** at the *Purchase Order Shipping* screen. This option is available only if the **Uses Invoicing** preference is selected and if you have the required authority.

> **Note:**
>
> If the **Require Invoice # at Shipping** preference is selected, you need to specify an **Invoice #** at the *Purchase Order Shipping* screen. In this situation, you do not need to use the **Create Invoice** screen or the *Invoice Upload* screen.

Post immediately or save for changes? When you create an invoice, the *Create Invoice Confirmation* window prompts you to either post the invoice immediately to the retailer, or save it for changes. There is certain information, such as payment terms, that you cannot specify for the invoice if you post it immediately; to enter this information, you need to save the invoice for changes and then use the *Invoice* screen to edit. See the *Create Invoice Confirmation* window and the *Invoice* screen for more information.

Vendor integration: You cannot create invoices through the *vendor integration*.

How to display: Select **Invoice Creation** from the *Home Screen* or the **Invoices** drop-down menu if you have the required authority.

Option	Procedure
search for shipments to include on an invoice	When you first advance to this screen, no purchase order shipments are displayed, and the *All Shipments* option is selected. To display: • **all uninvoiced shipments:** select the *Selected Shipments* option and then click **Search**. • **selected uninvoiced shipments:** select the *Selected Shipments* option, use any of the *Search fields*, and then click **Search** to restrict the displayed pack slips to those that match your selection(s). This screen can display a maximum of 500 shipments. **Note:** Clicking **Search** clears any entries you have made in the *Search Results fields*. **Case:** The enterable fields at the top of this screen are not case-sensitive for searching; for example, an entry of `A` or `a` matches an item number of `A12345`.

<table>
<tr><th>Option</th><th>Procedure</th></tr>
<tr><td>create an invoice for all uninvoiced shipments, or all uninvoiced shipments within a date range</td><td>

Leave the All Shipments option selected.
Optionally, use the Shipped From field, the Shipped To field, or both to indicate the shipment date range to include on the invoice. A shipment is included on the invoice only:

if you specify the Shipped From date but no Shipped To date, its Ship Date is on or after the Shipped From date.
if you specify the Shipped To date but no Shipped From date, its Ship Date is on or before the Shipped To date.
if specify both the Shipped To date and the Shipped From date, its Ship Date is on or between the two dates.

Enter the Invoice #, and complete any of the additional INVOICE HEADER fields.
Click Create. The Create Invoice Confirmation window opens. Use this window to save the invoice for editing or to submit the invoice to the retailer immediately.

Note:
The Search button is not available when the All Shipments option is selected.
Maximum purchase orders? When creating the invoice, the Vendor Portal includes the maximum number of purchase orders specified by the retailer, selecting the oldest shipments (matching all selected criteria) first. The maximum applies to purchase orders rather than shipments, so that if you have multiple shipments for the same purchase order, the multiple shipments count just once.
For more information: See the Create Invoice Confirmation window for a discussion on updates that take place when you create an invoice.
</td></tr>
</table>

Option	Procedure
create an invoice for selected shipments	• Select the *Selected Shipments* option and click **Search**. • Optionally, use any of the *Search fields* and click **Search** to restrict the search results to shipments that match your criteria. • Select each shipment to include in the invoice. • Enter the *Invoice #*, and complete any of the additional *INVOICE HEADER* fields. • Click **Create**. The *Create Invoice Confirmation* window opens. Use this window to save the invoice for editing or to submit the invoice to the retailer immediately. See the *Create Invoice Confirmation* window for more information. **Exceed maximum?** If you select shipments from a total number of purchase orders that exceeds the limit specified by the retailer, the screen displays an error message such as `The maximum number of POs to include on invoice is 20`. (Note that this maximum is based on the number of different purchase orders, not the number of shipments.) In this situation, you need to clear the selection check box for the required number of shipments so that you do not exceed this maximum.
advance to purchase order inquiry	Click the edit/display icon ( ) labeled **PO Inquiry** to advance to the *Purchase Order* screen, where you can review additional information about the purchase order.

Fields	Description
All Shipments	Use this option to create an invoice for all uninvoiced shipments, or for all uninvoiced shipments within a range of dates. See *create an invoice for all uninvoiced shipments, or all uninvoiced shipments within a date range* for more information. **Note:** The **Search** button is not available when the *All Shipments* option is selected.
Selected Shipments	Use this option to use any of the *Search fields* to search for uninvoiced shipments before creating an invoice.

Search fields
You can use any of the search fields, alone or in combination, to restrict the shipments displayed in the *Search Results fields*.

Fields	Description
Shipped From	If the *All Shipments* option is selected, use this field to restrict the shipments to include in an invoice: • Optionally, select a date from the calendar control to restrict the invoice to shipments with that **Ship Date** or later. It is not necessary to also select a **Shipped To** date. • Enter an *Invoice #* and complete any additional *INVOICE HEADER* fields. • Click **Create**. The *Create Invoice Confirmation* window opens. Use this window to save the invoice for editing or to submit the invoice to the retailer immediately. See the *Create Invoice Confirmation* window for more information. If the *Selected Shipments* option is selected, use this field to search for uninvoiced shipments: • Optionally, select a date from the calendar control. to display purchase order lines shipped on that date or later. It is not necessary to select a **Shipped To** date. • Enter any additional search criteria and click **Search**.
Shipped To	If the *All Shipments* option is selected, use this field to restrict the shipments to include in an invoice: • Optionally, select a date from the calendar control to restrict the invoice to shipments with that **Ship Date** or earlier. It is not necessary to also select a **Shipped From** date. • Enter an *Invoice #* and complete any additional *INVOICE HEADER* fields. • Click **Create**. The *Create Invoice Confirmation* window opens. Use this window to save the invoice for editing or to submit the invoice to the retailer immediately. See the *Create Invoice Confirmation* window for more information. If the *Selected Shipments* option is selected, use this field to search for uninvoiced shipments: • Optionally, select a date from the calendar control. to display purchase order lines shipped on that date or earlier. It is not necessary to select a **Shipped To** date. • Enter any additional search criteria and click **Search**.
PO Number	Optionally, enter a full or partial purchase order number and click **Search** to display uninvoiced shipments for purchase orders that start with or match your entry. This field is available only if the *Selected Shipments* option is selected. Not case-sensitive for searching; an entry of `A` or `a` matches a purchase order number of `A12345`.

Fields	Description
Order Number	Optionally, enter a full or partial number or code identifying the sales order in the originating system and click **Search** to display uninvoiced shipments for purchase orders whose sales order number starts with your entry. Up to 30 positions. This field is available only if the *Selected Shipments* option is selected. Not case-sensitive for searching; an entry of `A` or `a` matches an order number of `A12345`.
Item #	Optionally, enter a full or partial item number and click **Search** to display uninvoiced shipments whose item numbers start with or match your entry. This field is available only if the *Selected Shipments* option is selected. Not case-sensitive for searching; an entry of `A` or `a` matches an item number of `A12345`.

Eligible for Invoicing table
Includes: This table includes summary information on all shipments that are eligible to be included on an invoice.

To update the information in this summary table: Updating the information in this table requires you to click **Search**, or exit the screen and re-enter.

> **Note:**
>
> The **Search** button is not available when the *All Shipments* option is selected.

POs	The total number of purchase orders that include at least one shipped, uninvoiced unit.
PO Lines	The total number of purchase order lines that include at least one shipped, uninvoiced unit.
Units	The total number of shipped, uninvoiced units on all purchase orders.
Dollars	The total of the selling unit prices of all shipped, uninvoiced units.
INVOICE HEADER	

Fields	Description
Invoice #	The invoice number or code to submit to the retailer for the shipment of the selected pack slip(s). **Validation:** Your entry can consist of numbers, letters, and special characters, and must: • not be a duplicate of another invoice from you for the retailer • not exceed the maximum length specified by the retailer, which is based on the total number of shipments you can include on an invoice to the retailer. If the total number is 1 position (that is, a maximum of 9 shipments), the invoice number can be up to 9 positions; if the total number is 2 positions (that is, a maximum of 99 shipments), the invoice number can be up to 8 positions; and so on. If you specify an invoice number, the *Create Invoice Confirmation* window opens when you click **Update**.
Invoice Date	The date you are using to post the invoice to the retailer. The current date in your local time zone defaults, but you can override it.
Freight Charges	The total freight amount at the header level of the invoice. You can also enter a freight amount for individual shipments if you select the **Update and Save for Changes** option at the *Create Invoice Confirmation* window, then update the invoice through the *Invoice Inquiry* screen. See the *Create Invoice Confirmation* window for more information.
Handling Charges	The total handling amount at the header level of the invoice. You can also enter a handling amount for individual shipments if you select the **Update and Save for Changes** option at the *Create Invoice Confirmation* window, then update the invoice through the *Invoice Inquiry* screen. See the *Create Invoice Confirmation* window for more information.
Other Charges	The total additional charge amount at the header level of the invoice. You can also enter an additional charge amount for individual shipments if you select the **Update and Save for Changes** option at the *Create Invoice Confirmation* window, then update the invoice through the *Invoice Inquiry* screen. See the *Create Invoice Confirmation* window for more information.
Other Charges Description	A description of the additional charges on the invoice. Informational only. This description is not included in the invoice information submitted to the retailer. Your entry can be up to 30 positions.
Invoice Description	A description of the invoice. Informational only. This description is not included in the invoice information submitted to the retailer.
Search Results fields Use the results fields to select each shipment to include on the invoice.	
PO Number	The number or code identifying the purchase order in the originating system.

Fields	Description
Line #	The original purchase order line number for the shipment.
Order Number	The number or code identifying the sales order in the originating system.
Item #	Your item number or code. Hold the pointer over the **Item #** to display a description of the item.
Ship Date	The date when the shipment occurred. **Note:** Optionally, when you are confirming shipments through the: • *Purchase Order Shipping* screen, you can use the *Purchase Order Shipping Details* window to enter a separate tracking number, weight, rate, or shipment date for individual units or lines. See that window for more information. • *Purchase Order Shipping Upload* screen, you can enter a different ship date in the upload file. See that screen for more information.
Shipped Qty	The total quantity of the item shipped. When you include a shipment on an invoice, you cannot change the shipped quantity.
Unit Price	The original unit price for the item from the purchase order.
PO Inquiry	Click the PO Inquiry icon ( ) to advance to the *Purchase Order Inquiry* screen, where you can reveal the details of the purchase order, such as the sold-to and ship-to address, items, history, and messages.

Create Invoice Confirmation

Purpose: Use the **Create Invoice Confirmation** window to confirm the creation or update of an invoice through a Vendor Portal screen and to indicate whether to post the invoice immediately to the retailer, or save it so that you can make additional updates before posting.

How to display: Select:

- **Update** at the *Purchase Order Shipping* screen after specifying an **Invoice #**, or
- **Create** at the *Invoice Creation* screen after completing entry of the invoice information.
- **Save** at the *Invoice* screen after optionally entering any overrides to the invoice.

Completing this window:

- Select **Update and Save for Changes** and click **Save** if you would like to change any of the information on the invoice before submitting it to the retailer. See *Updating and Saving for Changes*, below, below for more information.
- Select **Update and Post Immediately** and click **Save** to submit the invoice to the retailer. See *Posting Immediately*, below, for more information.

Your last selected option is selected by default.

For more information: See the *Invoice Creation* screen for more information on creating and submitting invoices to the retailer.

If you display this window from the *Purchase Order Shipping* screen, this option provides a means to enter or change information not available through invoice creation.

Information available only through invoice inquiry is:

- payment terms
- changing the unit cost for one or more invoice detail lines
- freight, rate, and other charges at the invoice detail level
- informational messages (these are not sent to the retailer's system)

The invoice remains in **New** status until you post it to the retailer. As long as the invoice is in **New** status, you can use the *Invoice* screen to make additional changes to it, or delete it if you have the required authority.

If you change the unit cost of an invoice detail line beyond a percentage specified by the retailer, the invoice is flagged as out-of-balance. When you submit the invoice to the retailer, the invoice goes into **Held** status until the retailer approves or rejects it.

You cannot add additional purchase order lines to an invoice once you create it, regardless of its status.

See the *Invoice* screen for more information on the changes you can make to an invoice before posting.

If you select to post the invoice immediately, the Vendor Portal submits the invoice to the retailer. Once you select this option, you cannot override the unit cost, enter payment terms, or to enter or change any other information.

If you have not made any changes to the invoice, the invoice goes into **Approved** status, and then into **Posted** status as soon as it is posted to the retailer's system.

If you have edited the invoice and changed the costs of an invoice detail line beyond a percentage specified by the retailer, the invoice is flagged as out-of-balance and goes into **Held** status until the retailer approves or rejects it.

Initial creation through Vendor Portal screens: When you first create an invoice at the *Purchase Order Shipping* screen or the *Invoice Creation* screen and then complete the **Create Invoice Confirmation** window, the invoice is created in:

- **New** status if you select Select **Update and Save for Changes**.
- **Approved** status if you select **Update and Post Immediately**.

If you save for changes: The invoice remains in **New** status until you save your changes at the *Invoice* screen and then select **Update and Post Immediately** at the **Create Invoice Confirmation** window. Until you select this option, the invoice remains in **New** status.

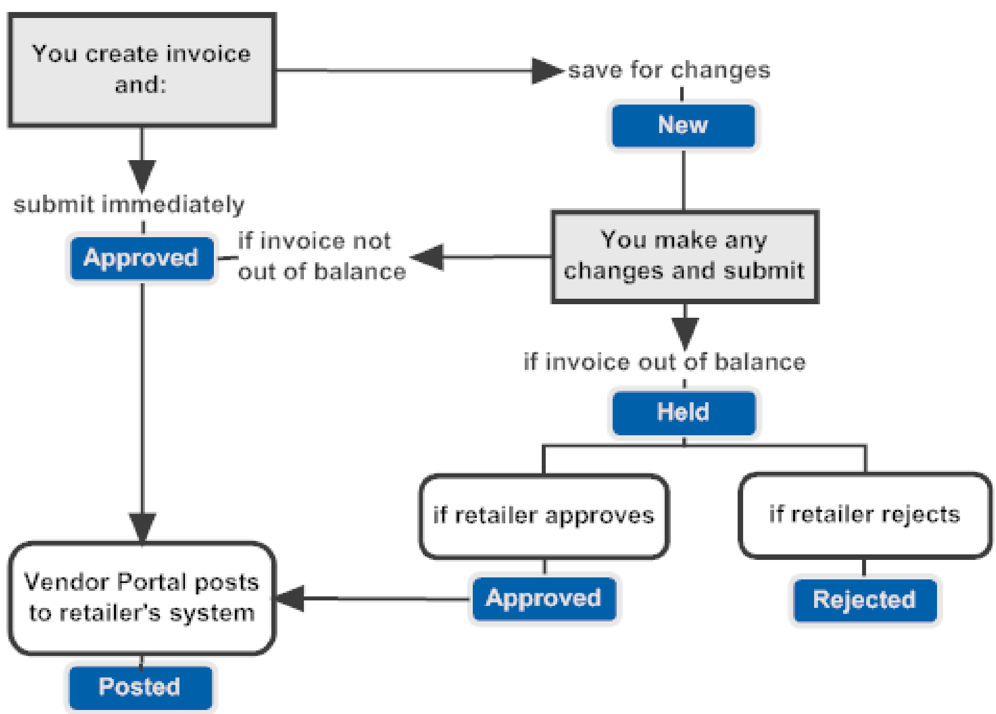
If the invoice does not include any out-of-balance lines: Once you select the **Update and Save for Changes** option, the invoice goes into **Approved** status, and then immediately goes into **Posted** status as soon as the Vendor Portal posts the invoice to the retailer's system.

If the invoice includes any out-of-balance lines: Once you select the **Update and Save for Changes** option, the invoice goes into **Held** status. It remains in **Held** status until the retailer either:

- **accepts the invoice:** the invoice goes into **Approved** status, and then immediately goes into **Posted** status as soon as the Vendor Portal posts the invoice to the retailer's system.
- **rejects the invoice:** the invoice goes into **Rejected** status. The Vendor Portal does not post a rejected invoice. Instead, you can use the *Invoice* screen to edit the invoice, or use the *Invoice Inquiry* screen to delete the invoice. If you delete the invoice, the purchase order shipments included in the invoice are again eligible to be included on a new invoice. Until you resubmit or delete the invoice, it remains in **Rejected** status.

Edit rejected invoice? You can use *Invoice* screen to edit the rejected invoice and resubmit it, or you can use the *Invoice Inquiry* screen to delete the rejected invoice.

Delete rejected invoice? If you delete the invoice, the invoice is no longer displayed on any screens, and the purchase order shipments included in the invoice are again eligible to be included on a new invoice.



Invoice upload: The invoice process flow is simpler for invoices that you upload rather than creating through Vendor Portal screens. See the *Invoice Upload* for more information.

Invoice Inquiry

Purpose: Use the **Invoice Inquiry** screen to select invoices for review or maintenance. You can also use this screen to delete an invoice if its status is **New** or **Rejected**.

How to display: Select **Invoice Inquiry** from the *Home Screen* or the **Invoices** drop-down menu if you have the required authority.

Option	Procedure
search for invoices	When you first advance to this screen, no invoices are displayed. To search, complete any of the *Search fields* and click **Search**. **Case:** The enterable fields at the top of this screen are not case-sensitive for searching; for example, an entry of `A` or `a` matches an item number of `A12345`.
select an invoice for review or maintenance	Click the edit/display icon ( ) next to an invoice to advance to the *Invoice* screen, where you can review the information on the invoice. If the invoice is in **New** or **Rejected** status, you can also use the *Invoice* screen to update the invoice and save the changes or submit the invoice to the retailer.
delete an invoice	Click the delete icon ( ) next to an invoice to delete it. Invoices are eligible to be deleted only if they are in **New** or **Rejected** status and if you have the required authority. When you delete an invoice: • the purchase order lines on the deleted invoice are eligible to be included in a new invoice • the invoice number is eligible to be assigned to a new invoice • the invoice is no longer displayed on any screens, including the **Invoices** tab on the *Purchase Order* screen

Fields	Description
Search fields You can use any of the search fields, alone or in combination, to restrict the invoices displayed in the *Search Results fields*. **Case:** The enterable fields at the top of this screen are not case-sensitive for searching; for example, an entry of `A` or `a` matches an item number of `A12345`.	

Fields	Description
Invoice Status	Optionally, select a status from the drop-down list and click **Search** to display invoices in that status, or leave this field blank to display invoices regardless of status. Possible statuses are: • **Approved** = The invoice was approved, either automatically or by the retailer, but has not yet posted to the retailer's system. • **Held** = You have submitted the invoice to the retailer, and the invoice includes at least one line that is out-of-balance because you changed the unit price by more than the *Unit Cost Threshold* specified by the retailer: for example, the retailer set a threshold of 10%, and you changed the unit price by 15%. The invoice remains in **Held** status until the retailer either approves or rejects it. • **New** = You selected the **Update and Save for Changes** option at the *Create Invoice Confirmation* window, and have not yet submitted the invoice for posting to the retailer's system. • **Posted** = The invoice has been posted to the retailer's system for payment processing. • **Rejected** = You submitted an invoice that includes an out-of-balance line to the retailer, and the retailer has rejected it. You can change the invoice so that it no longer contains an out-of-balance line, or you can delete the invoice.
Invoice Date	Optionally, select a date from the calendar control and click **Search** to display invoices with this date, or leave this field blank to display invoices regardless of date. This is the date you specified when creating the invoice. The current date defaults, but you can override this default when you use the *Invoice Creation* screen or *Invoice Upload* screen to create an invoice, or the *Invoice* screen to change an invoice.
Invoice Number	Optionally, enter a full or partial invoice number and click **Search** to display invoices whose invoice number starts with or matches your entry. Not case-sensitive for searching; an entry of `A` or `a` matches an invoice number of `A12345`.
PO Number	Optionally, enter a full or partial purchase order number and click **Search** to display invoices that include any purchase orders whose numbers start with or match your entry. Not case-sensitive for searching; an entry of `A` or `a` matches a purchase order number of `A12345`.
Order Number	Optionally, enter a full or partial number or code identifying the sales order in the originating system and click **Search** to display invoices that include purchase orders for sales orders whose order numbers start with or match your entry. Not case-sensitive for searching; an entry of `A` or `a` matches an order number of `A12345`.

Fields	Description
Search Results fields	
Invoice Number	The invoice number you specified when creating the invoice.
Invoice Amount	The total amount on the invoice, including: • the current extended price on all invoice lines • the freight, handling, and other charges at the invoice header level • the freight, handling, and other charges for all invoice lines
Invoice Date	The date you specified for the invoice.
Invoice Status	The current status of the invoice. See the *Invoice Status*, above, for descriptions of possible statuses.
Display	Click the edit/display icon ( ) next to an invoice to advance to the *Invoice* screen, where you can review the information on the invoice. If the invoice is in **New** or **Rejected** status, you can also use the *Invoice* screen to update the invoice and save the changes or submit the invoice to the retailer.
Delete	Click the delete icon ( ) next to an invoice to delete it. Invoices are eligible to be deleted only if they are in **New** or **Rejected** status and if you have the required authority. When you delete an invoice: • the purchase order lines on the deleted invoice are eligible to be included in a new invoice • the invoice number is eligible to be assigned to a new invoice • the invoice is no longer displayed at the **Invoices** tab on the *Purchase Order* screen

Invoice

Purpose: Use the **Invoice** screen to review or change an invoice.

When is an invoice eligible for change? An invoice is eligible for change only if the status is **New** or **Rejected**. See Changing an Invoice, below, for more information. Otherwise, all information for the invoice is display-only.

How to display:

- Select **Display** for an invoice at the *Invoice Inquiry* screen if you have the required authority
- Click the display icon ( ) at the Invoice tab of the *Purchase Order* screen if you have the required authority

> **Note:**
>
> If the **Invoice** screen was already open in another tab when you clicked the edit icon, you advance to this screen with the previous invoice information displayed.

Possible changes: The information you can change on an invoice includes:

- **Invoice header**:
  - **Invoice Summary** fields:
    - *Invoice Date*
    - *Invoice Description* and *Other Description*
    - *Freight*, *Handling*, and *Other Charge*
  - **Payment Terms** fields:
    - *Discount Percent*, *Discount Days Due*, and *Gross Days*

To update header information: Update each field and click **Save** to open the *Create Invoice Confirmation* window, or click **Cancel** to exit the screen without saving your changes.

- **Invoice line** (these fields are on the *Edit Invoice Detail* window):
  - *Invoice Unit Cost*
  - *Freight*, *Handling*, and *Other Charges*
  - *Other Description*

To update detail information: Use the *Edit Invoice Detail* window.

Delete line: Select the delete icon () to delete a shipment from the invoice.

Submit invoice or save? When you click **Save** at the **Invoice** screen, the *Create Invoice Confirmation* window opens. Use this window to indicate whether to save the invoice for further changes or submit the invoice, with any applied changes, to the retailer. See that window for more information.

Fields	Description
Invoice Information Unlabeled area at the top of the screen.	
Invoice Number	The invoice number you specified when creating the invoice.
Merchandise	The current extended price of all invoice lines.
Currency	A currency of USD is displayed regardless of the currency on the purchase orders included on the invoice.

Fields	Description
Invoice Status	Possible statuses are: • **Approved** = The invoice was approved, either automatically or by the retailer, but has not yet posted to the retailer's system. • **Held** = The invoice includes at least one line that is out-of-balance because you changed the unit price by more than the *Unit Cost Threshold* specified by the retailer: for example, the retailer set a threshold of 10%, and you changed the unit price by 15%. The invoice remains in **Held** status until the retailer either approves or rejects it. • **New** = You selected the **Update and Save for Changes** option at the *Create Invoice Confirmation* window, and have not yet submitted the invoice for posting to the retailer's system. • **Posted** = The invoice has been posted to the retailer's system for payment processing. • **Rejected** = You submitted an invoice that includes an out-of-balance line to the retailer, and the retailer has rejected it. You can change the invoice so that it no longer contains an out-of-balance line, delete a line on the invoice, or you can delete the invoice. You cannot change the invoice unless the status is **New** or **Rejected**.
Total	The total amount on the invoice, including: • the current extended price on all invoice lines • the freight, handling, and other charges at the invoice header level • the freight, handling, and other charges for all invoice lines
Header tab: Invoice summary fields	
Invoice Date	The date you specified for the invoice. Optionally, you can select a different date from the calendar control if the invoice is in **New** or **Rejected** status.
Invoice Description	The description you entered for the invoice. Informational only. Optionally, you can change, add, or delete the description if the invoice is in **New** or **Rejected** status.
Other Description	A description of the additional charges on the invoice. Informational only. Optionally, you can change, add, or delete the description if the invoice is in **New** or **Rejected** status.
Freight	The total freight amount at the header level of the invoice. Optionally, you can change, add, or delete the freight amount if the invoice is in **New** or **Rejected** status. Your entry cannot be a negative number.

Fields	Description
Handling	The total handling charge amount at the header level of the invoice. Optionally, you can change, add, or delete the handling charge amount if the invoice is in **New** or **Rejected** status. Your entry cannot be a negative number.
Other Charge	The total “other” charge amount at the header level of the invoice. Optionally, you can change, add, or delete the “other” charge amount if the invoice is in **New** or **Rejected** status. Your entry cannot be a negative number.
Detail Freight	The total freight charges on all invoice detail lines. You can review the freight charges for an invoice detail line at the *Browse Invoice Detail* or *Edit Invoice Detail* windows, available by clicking the **Display** icon ( ) at the *Detail tab*.
Detail Handling	The total handling charges on all invoice detail lines. You can review the handling charges for an invoice detail line at the *Browse Invoice Detail* or *Edit Invoice Detail* windows, available by clicking the **Display** icon ( ) at the *Detail tab*.
Detail Other Charge	The total “other” charges on all invoice detail lines. You can review the “other” charges for an invoice detail line at the *Browse Invoice Detail* or *Edit Invoice Detail* windows, available by clicking the **Display** icon ( ) at the *Detail tab*.

Header tab: Payment Terms fields
Use these fields to specify the payment terms for the invoice.

> **Note:**
>
> The Vendor Portal does not validate the payment terms fields. For example, it does not confirm that you enter a **Discount Percent** if you enter a **Discount Days Due**.

Discount Percent	The percentage discount for the retailer to apply when paying the invoice within the *Discount Days Due*. Can not exceed 100, and can include a 2-position decimal. Optionally, you can change, add, or delete the discount percentage if the invoice is in **New** or **Rejected** status.
Discount Days Due	The maximum number of days in which the retailer needs to pay the invoice in order to qualify for the *Discount Percent*. Up to 3 positions. Optionally, you can change, add, or delete the discount days due if the invoice is in **New** or **Rejected** status.
Gross Days	The number of days in which payment is due for the invoice. Up to 3 positions. Optionally, you can change, add, or delete the gross days if the invoice is in **New** or **Rejected** status.

Fields	Description
Detail tab This tab displays information about the line(s) you are billing on the invoice, and includes options to display or change additional information about the line(s). **Separate shipments?** Each shipment included in the invoice is listed separately, even if the shipments are for the same item on a purchase order. For example, if you ship 3 units of item ABC123 separately for purchase order 456, you can include all 3 shipments on the invoice, and each unit is listed separately at the **Detail** tab, even if each of the fields described below (**PO Number**, **PO Line #**, **Order Number**, **Item #**, etc.) is the same. **Note:** If the vendor uploaded the invoice and consolidated multiple shipments for a PO line into a single DETAIL record with full shipped qty, then there is not a unique invoice_line_no for each shipment of the PO detail line.	
PO Number	The number or code identifying the purchase order in the originating system.
PO Line #	The original purchase order line number for the shipment.
Order Number	The number or code identifying the sales order in the originating system.
Item #	Your item number or code. Hold the pointer over the **Item #** to display a description of the item.
Shipped Date	The date when the shipment occurred. **Note:** Optionally, when you are confirming shipments through the: • *Purchase Order Shipping* screen, you can use the *Purchase Order Shipping Details* window to enter a separate tracking number, weight, rate, or shipment date for individual units or lines. See that window for more information. • *Purchase Order Shipping Upload* screen, you can enter a different ship date in the upload file. See that screen for more information.
Invoice Qty	The total quantity included in the shipment and being billed on this invoice.
PO Unit Cost	The original unit cost from the purchase order.

Fields	Description
Invoice Unit Cost	The unit cost you are billing the retailer for the shipment. Multiplied by the **Invoice Qty**. **Changing the unit cost?** Optionally, you can use the *Edit Invoice Detail* window to override this unit cost if the invoice is in **New** or **Rejected** status. If the cost you enter exceeds or falls short of the original **PO Unit Cost** by more than the *Unit Cost Threshold* percentage specified by the retailer, the invoice detail line will be out-of-balance. For example, if the retailer sets the threshold at 10%, and you change the invoice unit cost by more than 10%, the invoice detail line is out-of-balance. **Held invoice?** When you submit an invoice that includes any out-of-balance lines, the invoice goes into **Held** status, and the retailer needs to either approve or reject the invoice. If the invoice's status is **Rejected**, you can edit the invoice, including the **Invoice Unit Cost**, again, and resubmit the invoice; or you can delete the invoice.
Balanced	The out-of-balance icon ( ) indicates if the invoice detail line is currently out-of-balance because the current **Invoice Unit Cost** differs from the original **PO Unit Cost** by the *Unit Cost Threshold* percentage specified by the retailer. Once the retailer approves the invoice, this indicator is no longer displayed.
Display	Click the **Display** icon ( ) to advance to the: • *Edit Invoice Detail* window if the invoice is in **New** or **Rejected** status. You can use this window to change the **Invoice Unit Cost**, detail-level charges, and the **Other Description** of the invoice line. You can also review additional information about the invoice detail line, including the retailer's item number, description, and sales order number. • *Browse Invoice Detail* if the invoice is not in **New** or **Rejected** status. You can use this window to review additional information about the invoice line.
Delete	Click the **Delete** icon (to delete the invoice detail line from the invoice. This option is available only if the invoice is in **New** or **Rejected** status. **Only line on the invoice?** If you delete the only line on the invoice, the invoice itself is deleted.
PO Inquiry	Click the **PO Inquiry** icon ( ) to advance to the *Purchase Order Inquiry* screen, where you can review the details of the purchase order, such as the sold-to and ship-to address, items, history, and messages.

History tab
This tab displays an entry for each activity that occurs related to the invoice.

Fields	Description
Action Type	Possible action types: • **Created** = You created the invoice through the *Purchase Order Shipping* screen, the *Invoice Creation* screen, or the *Invoice Upload* screen. • **Maintained** = You clicked **Save** at the *Invoice* screen. • **Submitted** = You submitted the invoice to the retailer. • **Approved** = The retailer approved an out-of-balance invoice, or the invoice was approved automatically because it was not out-of-balance. • **Rejected** = The retailer rejected an out-of-balance invoice. • **Posted** = The invoice was posted to the retailer's system. In this case, the **User** is **Admin** and the **Source** is **WS**.
Status	The status of the invoice as a result of the action. See the *Invoice Status*, above, for a listing of possible statuses.
Date / Time	The date and time when the action occurred. The date and time might not be your local date and time, if the retailer uses a server in a different time zone. For example, if your store location is on Eastern Standard time, and the retailer uses a server that is on Pacific time, the date and time displayed might be earlier than the current time in your location. The date and time can be the same for a series of actions when some of the actions take place automatically. For example, if you create an invoice that is not out-of-balance and it is submit it immediately, the Created, Submitted, and Posted actions can all have the same date and time.
User	The user ID of the person who performed the action. A user of **Admin** indicates that the action takes place automatically without user intervention.
Source	Possible sources are: • UI = The action took place at a screen. • WS = The action took place through a message sent automatically between two systems (posting the invoice to the retailer's system).

Fields	Description
Transaction Notes	Possible notes include: • **Invoice created** (**Action Type** = Created) • **Ready to Post** (**Action Type** = Submitted) • **Invoice Posted** (**Action Type** = Posted) • **Updated by Vendor** (**Action Type**= Maintained) • **Out of Balance. Submitted to Retailer for Approval** (**Action Type** = Submitted) • **Retailer Rejected - explanation**, where **explanation** is the retailer's note when rejecting the invoice (**Action Type** = Rejected) • **Retailer Approved - explanation**, where explanation is the retailer's note when approving the invoice (**Action Type** = Approved)

Edit Invoice Detail

Purpose: Use the **Edit Invoice Detail** window to review and, optionally, change information on an invoice detail line.

Information you can change: You can add or change the:

- *Invoice Unit Cost*
- *Freight*, *Handling*, and *Other Charges* amounts
- *Other Description*

All other information at this window is display-only.

Saving your changes: When you are done, click **Save** to save your changes or click **Cancel** to exit the window without saving. You also need to click **Save** at the *Invoice* screen and complete the *Create Invoice Confirmation* window to commit your changes to the invoice detail line.

Other options: You can exit the window without making any changes by clicking the **X** in the upper right corner of the window. If you have not made any changes, you can also advance to the previous or next invoice detail line by clicking the up or down arrows.

Browse window instead? You advance to this window rather than the *Browse Invoice Detail* window if you have the required authority and if the status of the invoice is **New** or **Rejected**.

How to display: Select the icon ( ) in the **Display** column at the *Detail tab* of the *Invoice* screen for an invoice that is in **New** or **Rejected** status if you have the required authority.

Field	Description
PO Number	The number or code identifying the purchase order in the originating system.
Order Number	The number or code identifying the sales order in the originating system.
PO Line #	The original purchase order line number for the shipment.

Field	Description
Item #	The code or number identifying the item. The description of the item follows, separated by a hyphen (-).
Retailer Item #	The retailer's item number or code. The retailer's description of the item follows, separated by a hyphen (-).
Shipped Date	The date when the shipment occurred. Optionally, when you are confirming shipments through the: • *Purchase Order Shipping* screen, you can use the *Purchase Order Shipping Details* window to enter a separate tracking number, weight, rate, or shipment date for individual units or lines. See that window for more information. • *Purchase Order Shipping Upload* screen, you can enter a different ship date in the upload file. See that screen for more information.
Invoice Qty	The total quantity included in a shipment and being billed on this invoice.
PO Unit Cost	The original unit cost from the purchase order.
Invoice Unit Cost	The unit cost you are billing the retailer for the shipment. Multiplied by the **Invoice Qty**. Defaults from the PO unit cost. Required. **Changing the unit cost?** Optionally, you can override this unit cost if the invoice is in **New** or **Rejected** status. If the cost you enter exceeds or falls short of the original **PO Unit Cost** by more than the *Unit Cost Threshold* percentage specified by the retailer, the invoice detail line will be **out-of-balance**. For example, if the retailer sets the threshold at 10%, and you change the invoice unit cost by more than 10%, the invoice detail line is out-of-balance. If the line is out-of-balance, the out-of-balance indicator ( ) is displayed. Once the retailer approves the invoice, this indicator is no longer displayed. **Held invoice?** When you submit an invoice that includes any out-of-balance lines, the invoice goes into **Held** status, and the retailer needs to either approve or reject the invoice. If the invoice's status is **Rejected**, you can edit the invoice, including the **Invoice Unit Cost**, again, and resubmit the invoice; or you can delete the invoice.
Extended Invoice Cost	The current **Invoice Unit Cost** * the **Invoice Qty**.
Freight	The total freight charge for this invoice detail line. Optionally, you can change, add, or delete the freight amount if the invoice is in **New** or **Rejected** status. Your entry cannot be a negative number.
Handling	The total handling charge for this invoice detail line. Optionally, you can change, add, or delete the handling amount if the invoice is in **New** or **Rejected** status. Your entry cannot be a negative number.
Other Charges	The total "other" charge for this invoice detail line. Optionally, you can change, add, or delete the "other" amount if the invoice is in **New** or **Rejected** status. Your entry cannot be a negative number.

Field	Description
Other Description	A message about the invoice detail line. Informational only; this description is not included in the invoice information submitted to the retailer. Optionally, you can change, add, or delete the description if the invoice is in **New** or **Rejected** status.
Last Update	The last date and time when you updated the invoice detail line. Does not reflect activity by the retailer. The date and time might not be your local date and time, if the retailer uses a server in a different time zone. For example, if your store location is on Eastern Standard time, and the retailer uses a server that is on Pacific time, the date and time displayed might be earlier than the current time in your location.

Browse Invoice Detail

Purpose: Use the **Browse Invoice Detail** window to review information about a detail line on an invoice.

How to display: Select the icon ( ) in the **Display** column at the *Detail tab* of the *Invoice* screen for an invoice if you have the required authority. If you have authority to edit an invoice, you advance to this window rather than the *Edit Invoice Detail* window only if the invoice is not in **New** or **Rejected** status.

Field	Description
PO Number	The number or code identifying the purchase order in the originating system.
Order Number	The number or code identifying the sales order in the originating system.
PO Line #	The original purchase order line number for the shipment.
Item #	The code or number identifying the item. The description of the item follows, separated by a hyphen (-).
Retailer Item #	The retailer's item number or code. The retailer's description of the item follows, separated by a hyphen (-).
Shipped Date	The date when the shipment occurred. Optionally, when you are confirming shipments through the: • *Purchase Order Shipping* screen, you can use the *Purchase Order Shipping Details* window to enter a separate tracking number, weight, rate, or shipment date for individual units or lines. See that window for more information. • *Purchase Order Shipping Upload* screen, you can enter a different ship date in the upload file. See that screen for more information.
Invoice Qty	The total quantity included in a shipment and being billed on this invoice.
PO Unit Cost	The original unit cost from the purchase order.

Field	Description
Invoice Unit Cost	The unit cost you are billing the retailer for the shipment. Multiplied by the **Invoice Qty**. **Changing the unit cost?** Optionally, you can use the *Edit Invoice Detail* window to edit this unit cost if the invoice is in **New** or **Rejected** status. If the cost you enter exceeds or falls short of the original **PO Unit Cost** by more than the *Unit Cost Threshold* percentage specified by the retailer, the invoice detail line will be **out-of-balance**. For example, if the retailer sets the threshold at 10%, and you change the invoice unit cost by more than 10%, the invoice detail line is out-of-balance. If the line is out-of-balance, the out-of-balance indicator ( ) is displayed. Once the retailer approves the invoice, this indicator is no longer displayed. **Held invoice?** When you submit an invoice that includes any out-of-balance lines, the invoice goes into **Held** status, and the retailer needs to either approve or reject the invoice. If the invoice's status is **Rejected**, you can edit the invoice, including the **Invoice Unit Cost**, again, and resubmit the invoice; or you can delete the invoice.
Extended Invoice Cost	The current **Invoice Unit Cost** * the **Invoice Qty**.
Freight	The total freight charge for this invoice detail line.
Handling	The total handling charge for this invoice detail line.
Other Charges	The total "other" charge for this invoice detail line.
Other Description	A message about the invoice detail line. Informational only.
Last Update	The last date and time when you updated the invoice detail line. Not updated when the vendor accepts or rejects the invoice. The date and time might not be your local date and time, if the retailer uses a server in a different time zone. For example, if your store location is on Eastern Standard time, and the retailer uses a server that is on Pacific time, the date and time displayed might be earlier than the current time in your location.

Invoice Upload

Purpose: Use the **Invoice Upload** screen to upload a CSV (comma-separated value) file containing one or more invoices for purchase orders.

Other ways to create invoices: You can also create invoices by:

- specifying an **Invoice #** at the *Purchase Order Shipping* screen. This option is available only if the **Uses Invoicing** preference is selected and if you have the required authority.
- using the *Invoice Creation* screen.

Vendor integration: You cannot create invoices through the *vendor integration*. You need to use a screen in the Vendor Portal, as described above.

Posted immediately: When you create an invoice through the upload and it is not out-of-balance, the invoice is created in **Approved** status, and is eligible to be posted immediately to the retailer's system. You do not have an opportunity to modify the invoice through the *Invoice Inquiry* screen.

Eligible purchase order lines: Only purchase order lines in **Shipped** status are eligible to be included in invoices.

Multiple files? Some browsers support uploading multiple files at the same time; however, you might not receive an error email or be able to review all errors when uploading multiple files. To make sure you understand any errors that might occur, upload the files one at a time.

How to display this screen: Select **Invoice Upload** from the *Home Screen* or the **Invoices** drop-down menu if you have the required authority.

To create one or more invoices by uploading a CSV file at this screen:

- Click the **Choose Files** button.
- Select the file(s) to upload. Your selection must have the CSV extension (for example, INVOICE.CSV).
- Click **Upload**.
- Click **Refresh** to see if the invoice upload was successful or if there are any errors, as indicated by the *Status* field.

> **Note:**
>
> To make sure that you can review any errors that might occur, you should not upload more than one CSV file at a time, even if your browser supports it. Otherwise, the *Invoice Upload - Errors* might not be available, and the notification email might not be generated.

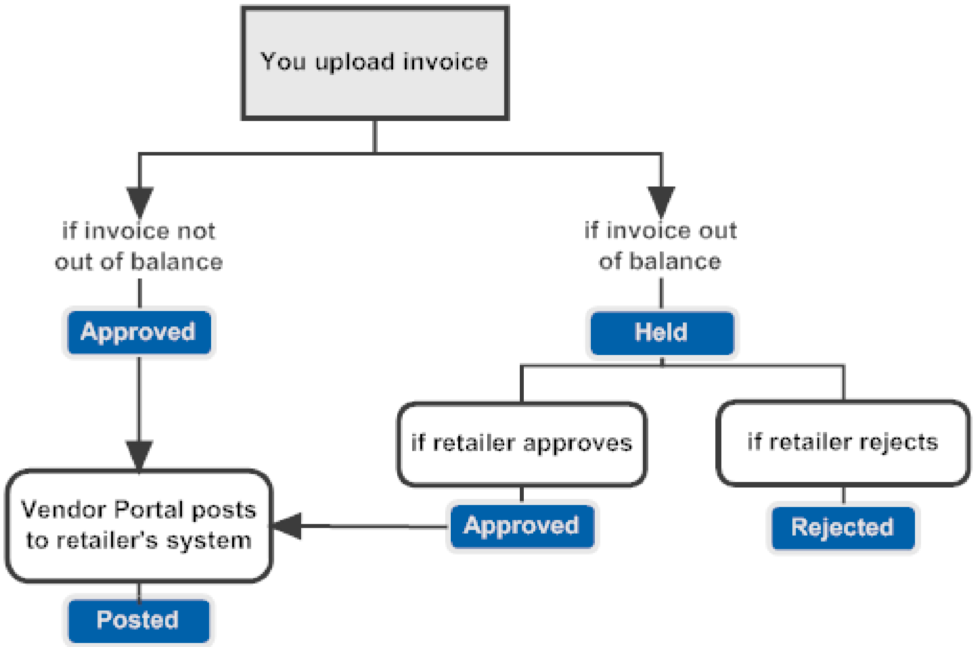
If successful: For each invoice in the CSV that does not include any lines in error, the Vendor Portal:

- Creates the invoice using the information from the *Header Fields*
- Creates invoice detail lines using the information from the *Detail Fields*
- Puts the invoice in **Approved** status if there are no lines out-of-balance, and the invoice goes into **Posted** status as soon as it is posted to the retailer's system; otherwise, puts the invoice in **Held** status

Retailer approves or rejects: If the retailer approves the held invoice, the Vendor Portal posts the invoice to the retailer's system, and the invoice status is **Posted**. Otherwise, if the retailer rejects the held invoice, the invoice goes into **Rejected** status.

Edit rejected invoice? You can use *Invoice* screen to edit the rejected invoice and resubmit it, or you can use the *Invoice Inquiry* screen to delete the rejected invoice.

Delete rejected invoice? If you delete the invoice, the invoice is no longer displayed on any screens, and the purchase order shipments included in the invoice are again eligible to be included on a new invoice.



If unsuccessful: For each invoice in the CSV file that includes an error on any lines, the Vendor Portal flags the first error it finds and displays the upload error icon ( ) in the **Errors** column. The invoice is not created. Click the icon to open the *Invoice Upload - Errors* window and review the error(s). See that window for more information.

The Vendor Portal also generates an email notification to the retailer and to the **Upload Error Notification** email address specified at the *Vendor Configuration* screen. The email includes information about the data in error.

Contents of the file: Each CSV file should contain the following unlabeled fields in the order indicated below. Each value should be surrounded by single quotes (') and separated by a comma. Also, there needs to be a carriage return after each line. You can generate a CSV file in a spreadsheet application and then choose to save the spreadsheet in CSV format.

> **Note:**
>
> Negative quantities or amounts are not supported.

Sample file: A sample file might be formatted as follows:

HEADER,UO0001,hdr invoice description,DR,20130725,1.11,2.22,3.33,hdr other charges desc,2,20,30

DETAIL,389,2,,,V257SCARFBLUE,0.11,0.22,0.33,detail other desc,1.11,2

Field	Description
Header Fields	
A: Record Type	Must be set to `HEADER`. Required.

Field	Description
B: Invoice Number	Must be an unassigned invoice number, and cannot exceed the maximum length specified by the retailer, which is based on the total number of shipments you can include on an invoice to the retailer. If the total number is 1 position (that is, a maximum of 9 shipments), the invoice number can be up to 9 positions; if the total number is 2 positions (that is, a maximum of 99 shipments), the invoice number can be up to 8 positions; and so on. Required.
C: Invoice Description	Informational only. No validation. Displayed for the invoice, but not sent to the retailer. Optional.
D: Invoice Type	Must be set to `DR`. Required.
E: Invoice Date	Can be a future or past date. Must be entered in the correct format for your locale (as defined at the *Vendor Configuration* screen). Required.
F: Freight Charges	Header-level freight charges. Should be set to 0 if there are no header-level freight charges. Required.
G: Handling Charges	Header-level handling charges. Should be set to 0 if there are no header-level handling charges. Required.
H: Other Charges	Header-level “other” charges. Should be set to 0 if there are no header-level “other” charges. Required.
I: Other Charges Description	Informational only. No validation. Not sent to the retailer. Optional.
J: Discount Percentage	The discount percentage to apply if the invoice is paid within the **Discount Days**. Can include a 2-place decimal and cannot exceed 100. Should be set to 0 if there is no discount percentage available. Required. **Note:** The Vendor Portal does not validate the payment terms fields. For example, it does not confirm that you enter a **Discount Percent** if you enter a **Discount Days Due**.
K: Discount Days	The number of days within which the invoice should be paid to qualify for the discount percentage. Should be set to 0 if there is no number of days within which the invoice qualifies for a discount. Up to 3 positions. Required.
L: Gross Days	The total number of days until payment of the invoice is due. Should be set to 0 if there is no specified due date. Up to 3 positions. Required.
Detail Fields	
A: Record Type	Must be set to `DETAIL`. Required.
B: PO Number	Must specify a valid purchase order number. Required.
C: PO Line Number	Must specify a valid line number on the purchase order. Required.

Field	Description
D: RA Number	Not currently implemented. If there is information in this column, it is ignored.
E: RA Line Number	Not currently implemented. If there is information in this column, it is ignored.
F: Vendor Item Number	Informational only. No validation.
G: Freight Amount	Updates the freight amount for the invoice detail line. Must be set to 0 if there are no detail freight charges.
H: Handling Amount	Updates the handling amount for the invoice detail line. Must be set to 0 if there are no detail handling charges.
I: Other Amount	Updates the "other" amount for the invoice detail line. Must be set to 0 if there are no detail "other" charges.
J: Other Description	Informational only. Displayed for the invoice detail, but not sent to the retailer. Truncated if it exceeds 30 positions. Optional.
K: Invoice Unit Cost	The unit cost that you are charging the retailer. Required. If the invoice unit cost varies from the purchase order unit cost by a percentage specified by the retailer, the invoice is **out-of-balance**. When you upload the invoice, it remains in **Held** status until the retailer approves or rejects it.
L: Invoice Quantity	The quantity of the item included on the invoice. You can include a partial purchase order quantity on an invoice if you processed a partial shipment with this quantity for the purchase order line; otherwise, you need to include the entire shipped, uninvoiced purchase order quantity. **Examples:** • **If each unit ships separately:** A purchase line has a quantity of 4. Each unit needs to ship separately. You ship all 4 units. The invoice can include up to 4 invoice detail lines, each with a quantity of 1, or it can include a single invoice detail line with a quantity of 4. The invoice cannot include an invoice detail line with a quantity of 2 or 3. • **If you make a partial shipment:** A purchase order line has a quantity of 5. You ship the 3 units that you have in stock when you receive the purchase order, then you ship the remaining 2 units when they are available. The invoice can include a line for 2 units; a line for 3 units; two lines for 2 and 3 units, respectively; or a line for 5 units. The invoice cannot include an invoice detail line with a quantity of 1 or 4 units.

Fields	Description
Date	The date and time when you uploaded the CSV file to confirm shipment(s). The date and time might not be your local date and time, if the retailer uses a server in a different time zone. For example, if your store location is on Eastern Standard time, and the retailer uses a server that is on Pacific time, the date and time displayed might be earlier than the current time in your location.

Fields	Description
Status	The status of the upload: • **Completed:** The Vendor Portal processed all the shipment updates specified in the CSV file. • **Completed with Errors:** You uploaded just one CSV file at a time, and one or more shipment updates specified in the file contained errors. Click the upload error icon ( ) to open the *Invoice Upload - Errors* window and review the errors. • **Failed:** You uploaded more than one CSV file at a time, and one or more shipment updates specified in the file contained errors. Upload the files one at a time so that you can review the errors. • **Uploaded:** You have just uploaded the file and it is currently processing. The file stays in this status briefly until processing completes. If a file remains in this status, contact the retailer to confirm that the upload folder has been created.
File Name	The name of the CSV file that you uploaded.
User ID	The user ID of the person who uploaded the file.
Errors	The upload error icon ( ) indicates that one or more records in the CSV file was incorrect. Click the icon to open the *Invoice Upload - Errors* window and review the errors. **Note:** If you upload more than one file at a time, you might not be able to review errors at the *Invoice Upload - Errors* window and the email might not be generated. Upload the files one at a time so that you can review all errors.

Invoice Upload - Errors

Purpose: Use the **Invoice Upload - Errors** window to review errors that occurred when you uploaded one or more invoices in a comma-separated value file.

> **Note:**
>
> If the last record in the file is not followed by a carriage return/newline character, the last record is not uploaded.

How to display this screen: Select the error icon ( ) at the *Invoice Upload* screen.

The following table describes possible invoice upload errors.

> **Note:**
>
> You might not be able to review errors if you upload multiple files at one time.

Error Description	Explanation
invalid discount days. Value must be a number between 0 and 999	The discount days field is not set to a number from 0 and 999.
invalid gross days. Value must be a number between 0 and 999	The gross days field is not set to a number from 0 and 999.
invalid discount percentage. Value must be a number between 0.00 and 100.00	The discount percent field is not set to a number from 0 and 100.00.
invalid freight charges	The header-level or detail-level freight charges field is blank. The field should be set to 0 if there are no header-level or detail-level freight charges.
invalid handling charges	The header-level or detail-level handling charges field is blank. The field should be set to 0 if there are no header-level or detail-level handling charges.
invalid invoice date	No invoice date is specified.
invalid invoice number	The invoice number specified is already used, no invoice number is specified, or the invoice number exceeds the maximum length specified by the retailer.
invalid invoice type	The invoice type is not set to `DR`.
invalid invoice unit cost	The unit cost is blank for a detail line or includes a non-numeric character. When this error occurs, no invoices from the file are created.
invalid number of columns	The last column of the HEADER record (gross due days) is blank.
invalid other charges	The header-level or detail-level “other” charges field is blank. The field should be set to 0 if there are no header-level or detail-level “other” charges.
Invalid PO line number	No line number is specified, or the line number specified is not valid for the purchase order.
Invalid PO Number	No purchase order number was specified, or the purchase order number specified was invalid.
Invalid PO Status	The purchase order line has not been shipped.
invalid record type	The record type was not set to HEADER or DETAIL, or the file included one or more blank rows.
Invalid # of data columns	Can occur if the number of columns for the header or detail are not the same as those described above.
Invoice quantity exceeds available to invoice quantity	The invoice quantity specified exceeds the uninvoiced quantity on the purchase order detail line.
Maximum number of purchase orders per invoice exceeded for invoice	The number of purchase orders specified for an invoice is greater than the maximum specified by the retailer.

Error Description	Explanation
PO has already been invoiced	All items for the purchase order number specified are already included on an invoice.
?Miscellaneous error java.lang.StringIndexOutOfBoundsException: String index out of range: 4	The date specified is zero (0) or non-numeric.

5 Vendor Configuration

Purpose: Use the **Vendor Configuration** screen to:

- review and configure pack slip generation and email notification settings

> **Note:**
>
> Both you and the retailer can update these settings.

- review the retailer's information and settings for your business, including:
  - your contact information and addresses and return address
  - preferences, including:
    - integration information, if you use an integration rather than the Vendor Portal screens to import purchase orders into your system and send shipment updates
    - invoicing options
    - the carriers that are eligible by default for shipments

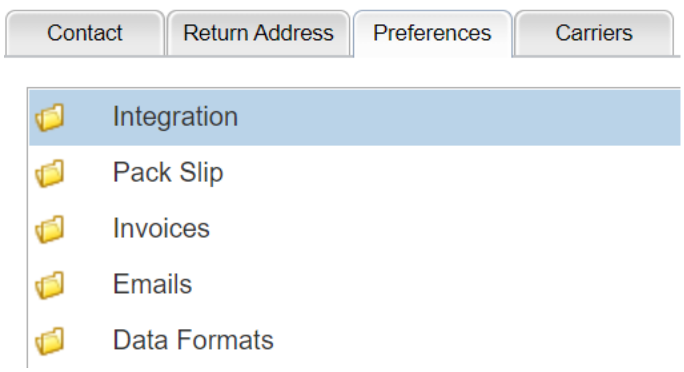
How to display this screen: Select **Vendor Configuration** from the *Home Screen* or the **Administration** drop-down menu if you have the required authority.

Field	Description
Vendor Code	The code identifying your business.
Vendor Name	The descriptive name of your business.
Contact tab	
All fields on this tab are display-only.	
Contact Name	The **Name** of the contact for your business.
Emails	One or more email addresses for your business.
Telephones	Includes: • **Telephone** • **Ext** (extension) • **Fax**
Address	Made up of: • **Address:** up to four address lines • **Suite.** • **City** • **State/Province** • **Country** • **Postal Code** (ZIP code)
Return Address tab	
All fields on this tab are display-only and informational only.	
Company	

Field	Description
Contact Name	
Emails	
Telephone	Includes: • **Telephone** • **Ext** (extension) • **Fax**
Address	Made up of: • **Address:** up to four address lines • **Suite** • **City** • **State/Province** • **Country** • **Postal Code** (ZIP code)

Preferences tab

Each preference category is available for review by clicking the folder in the left-hand tab.



Integration and PO Schedule options

Use these fields to configure the integration between your system and the Vendor Portal for the purposes of receiving purchase orders and confirming shipments through JSON messages rather than using the Vendor Portal screens.

See the *Integrated Vendor Process Flow* for background.

Enable Integration	If this flag is selected, the Vendor Portal includes the *Get Purchase Orders* screen rather than the *Select Purchase Orders* screen. Only the retailer can change the setting of this flag. The use of the *Get Purchase Orders* screen is not currently implemented. The vendor system needs to send a JSON request message to the Vendor Portal in order to request purchase orders. Contact the retailer for more information.
Require Acknowledgement	If this flag is selected, a purchase order's status doesn't change to **In Process** when the integration initially sends the purchase order to an integrated vendor system, and no pack slip or pullsheet is generated based on the settings at the *Pack Slip options* folder; instead, the integrated system needs to send an acknowledgment to update the status of the purchase order or generate the pack slip and pullsheet. Only the retailer can change the setting of this flag. Contact the retailer for more information.

Field	Description
Vendor Client Id	Indicates the client ID for you to use when authenticating the getDSOrders, setDSAcknowledge, and setDSConfirm messages. Required for an integrated vendor to successfully submit these messages. Display-only.
Pack Slip options Control the documents generated when you select purchase orders for fulfillment, either through the *Select Purchase Orders* screen or through the *vendor integration*. Both you and the retailer can update these settings.	
Generate Format	Indicates the format in which to generate the pack slip. Possible settings are: • **Both PDF and CSV** = Generate both a PDF of the *Pack Slip* and the *Pack Slip CSV File*. • **CSV** = Generate the *Pack Slip CSV File*, but no PDF *Pack Slip*. • **PDF** = Generate a PDF of the *Pack Slip*, but no *Pack Slip CSV File*. **Note:** If the **PDF Form Type** is set to **None**, no PDFs or CSVs are generated for the pack slip, regardless of the setting of the **Generate Format** field.
PDF Form Type	Controls the format of the PDF of the *Pack Slip*: • **Graphical** (default) = The pack slip PDF includes graphical elements, including the logo specified for the brand. • **Non-Graphical** = The pack slip PDF does not include any graphical elements. You would have this setting if you print the pack slip PDF onto pre-printed forms. • **None** = No pack slip PDF is generated, regardless of the setting of the **Generate Format** field.
Print Batch PullSheet	Controls whether to generate the PDF *Pack Slip Batch Pullsheet* to aid in picking stock when you generate pack slips. If this option is: • selected = A graphical PDF *Pack Slip Batch Pullsheet* is generated when you generate pack slips. • unselected (default) = No pullsheet is generated when you generate pack slips.
Invoices options	
Uses Invoicing	Controls general support for invoicing in the Vendor Portal: • selected = The **Invoice #** field is available at the *Purchase Order Shipping* screen, and the *Home Screen* displays the number of purchase orders eligible for invoicing. • unselected (default) = The **Invoice #** field is not available at the *Purchase Order Shipping* screen, and the Vendor Portal *Home Screen* does not display the number of purchase orders eligible for invoicing.

Field	Description
Require Invoice # at Shipping	Controls whether entry of an invoice number is required at the *Purchase Order Shipping* screen: • selected = Entry of the **Invoice #** is required at the *Purchase Order Shipping*. • unselected (default) = Entry of the **Invoice #** is not required at the *Purchase Order Shipping*. If the **Uses Invoices** field is selected, then entry of an invoice is optional at the *Purchase Order Shipping* screen. Controls whether entry of an invoice number is required at the **Purchase Order Shipping** screen in the Vendor Portal: • selected = Entry of the **Invoice #** is required at the **Purchase Order Shipping** screen in the Vendor Portal. If this field is selected, you must also select the **Uses Invoices** field, so that the **Invoice #** field is available for entry at the **Purchase Order Shipping** screen. **Note:** You cannot select this option unless the **Uses Invoices** preference, above, is selected. • unselected (default) = Entry of the **Invoice #** is not required at the **Purchase Order Shipping** screen in the Vendor Portal. If the **Allow Invoices** field is selected, then entry of an invoice is optional at the **Purchase Order Shipping** screen. • If this setting is selected, then you cannot confirm shipments at the **Purchase Order Shipping** screen without authority to create invoices. • This setting does not affect the *Integrated Shipping* screen or the *Purchase Order Shipping Upload* screen; it applies to the **Purchase Order Shipping** screen only.
Unit Cost Threshold	The maximum percentage by which the unit cost on an invoice can exceed or fall below the original cost and still be approved automatically. If you override the unit cost to an amount that exceeds or falls below the original cost by more than this percentage, the invoice goes into **Held** status for the retailer's review upon submission. The **Unit Cost Threshold** is set to 10%, and the original unit cost on a shipped purchase order line is $10.00. If you override the unit cost to: • between $11.00 and $9.00, the invoice goes into **Approved** status upon submission, because the unit price is still within the 10% threshold. • $11.01 or higher, or to $8.99 or lower, the invoice goes into **Held** status when you submit it. The Vendor Portal evaluates each shipped line on the invoice individually, not the invoice as a whole. If any individual line breaches the threshold, the invoice is held. If you set the threshold is set to 0%, the invoice goes into **Held** status if you change the unit cost at all.

Field	Description
Emails options Controls the email notifications generated. Both you and the retailer can update this information.	
PO Notification	Select this flag to have the Vendor Portal send an email notification to the email address(es) indicated when it receives new purchase orders from the retailer for fulfillment or the retailer sends an address change, cancellation request, or cost change. At least one email address is required if the flag is selected. Separate each additional email address with a semicolon and no space.
Upload Error Notification	Select this flag to have the Vendor Portal send an email notification to the email address(es) indicated if there are any errors when you upload shipment confirmations or invoices through the *Purchase Order Shipping Upload* screen or the *Invoice Upload* screen. At least one email address is required if the flag is selected. Separate each additional email address with a semicolon and no space.
Invoice Balance Notification	Select this flag to have the Vendor Portal send an email notification to the email address(es) indicated when the retailer approves or rejects a held invoice that includes any **out-of-balance** lines. At least one email address is required if the flag is selected. Separate each additional email address with a semicolon and no space.

Data Formats options
These fields control:
• the language to use on pullsheets, and for emails to your organization
• the date/time and numeric formats to use:
  – on pullsheets
  – for system-generated emails to your organization
  – on Vendor Portal screens
• The language displayed on Vendor Portal screens is controlled by the locale code appended to the URL for the Vendor Portal.
• The Vendor Portal link embedded in emails opens the Vendor Portal using the default locale for the retailer, which may differ from the **Language** defined here.
• The packslip uses the retailer's language and data formats.	

Language	The language to use for pullsheets, and for system-generated emails to your organization. Available languages are: • Brazil-Portuguese • China-Chinese (simplified) • France-French • Germany-German • Italy-Italian • Japan-Japanese (Gregorian calendar) • Netherlands-Dutch • Russia-Russian • Spain-Spanish • Sweden-Swedish • United States-English (default) Required.

Field	Description
Date Format	The format to use for the display of dates: • on Vendor Portal screens • on the pullsheet • in system-generated emails to your organization Available formats are: • MM/DD/YYYY (default): Month/day/year, for example: 12/31/2017 • DD.MM.YYYY: Day.month.year, for example: 31.12.2017 • DD/MM/YYYY: Day/month/year, for example: 31/12/2017 • YYYY/MM/DD: Year/month/day, for example: 2017/12/31 • DD-MM-YYYY: Day-month-year, for example: 31-12-2017 Required.
Time Format	The format to use for the display of times: • on Vendor Portal screens • in the pullsheet • in system-generated emails to your organization Available formats are: • AM/PM (default): For example: 11:40 AM • 24 Hour: For example: 13:01 Required.
Decimal Separator	The character to use as a decimal separator: • on Vendor Portal screens • in the pullsheet • in system-generated emails to your organization Available formats are: • Period (default): For example, 12.34 • Comma: For example, 12,34 Required.

> **Note:**
>
> The decimal separator and the thousands separator cannot be the same.

Field	Description
Thousands Separator	The character to use as a separator for numbers over 3 positions: • on Vendor Portal screens • in the pullsheet • in system-generated emails to your organization Available formats are: • Comma (default) For example, 1,234 • Period: For example, 1.234 • Space: For example, 1 234 Required. **Note:** The decimal separator and the thousands separator cannot be the same.
Carriers tab This tab indicates which carriers you can use for shipping purchase orders. All fields are display-only.	
Carrier Code	The code identifying the carrier.
Carrier Description	The description of the carrier.
Tracking # Required	Selected if you must provide a tracking number for each shipment using this carrier; otherwise, the tracking number is optional.
Weight Required	Selected if you must provide the shipping weight for each shipment using this carrier; otherwise, the shipping weight is optional.
Rate Required	Selected if you must provide the shipping rate for each shipment using this carrier; otherwise, the shipping rate is optional.
Active	Selected if the carrier is currently active. Only active carriers are available for assignment when confirming shipments through the *Purchase Order Shipping* screen, although you can specify an inactive carrier when uploading shipments through the *Purchase Order Shipping Upload* screen.

6
About Vendor Portal

Purpose: Use the **About Vendor Portal** window to identify the current version of the Vendor Portal for troubleshooting purposes.

How to display this window: Select **About > About Vendor Portal** from the top of the screen.

All fields in this window are display-only.

Field	Description
Version	The current build number for the Vendor Portal, including the release number, patch number, build number, and date stamp, for example: 17.0.3.332-2017-11-06_12-13-14, where 17.0 is the release number, 3 is the patch number, 332 is the build number, and the date and time are November 6, 2017 at 12:13:14.

7 Frequently Asked Questions

If certain screens display fields incorrectly: If you are using Internet Explorer, make sure that you are not displaying the Vendor Portal screens in **Compatibility View** mode. **Compatibility View** should be turned off for the Vendor Portal.

Customer data replaced with asterisks? Customer data, including name, company, address, phone numbers, and email addresses, on closed purchase orders can be replaced with asterisks. Often, the retailer purges this data a specified number of days after the purchase order is shipped or canceled.

When a session times out: You advance to the Inactivity Timeout screen if there has been no activity in the Vendor Portal during the number of minutes specified as the *Portal UI Timeout* interval by the retailer. The Inactivity Timeout screen displays the message "Your single sign-on (SSO) session has timed out due to inactivity and you have been signed out of Supplier Direct Fulfillment Vendor Portal," and includes the **Login** option for you to enter your credential again.

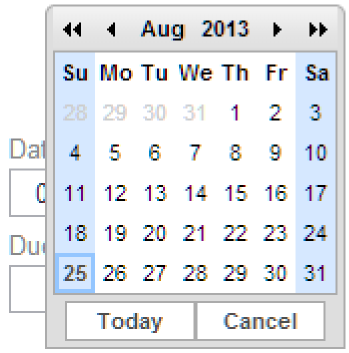
Logging out of the Vendor Portal: Oracle recommends to log out of the Vendor Portal and not just close the browser or browser tab; otherwise, you will not be able to log back into the Vendor Portal until the single sign-on session is cleared.

Performing a search

Unless otherwise indicated, codes and names are case-sensitive (A is not the same as a). When searching for a specific record on a screen, you must enter the case correctly; for example, if you are searching for **Item #** V1000, you must enter `V1000` in the **Item #** field, and not `v1000`.

Commonly used terms

Some terms commonly used in the Vendor Portal are described below.

Term	Description
calendar control	The easiest way to enter a date is to click the calendar icon ( ) next to the related date field, and then select the date from the calendar control: 
CSV	A comma-separated value file, or a text file in which the information fields are enclosed by quotation marks and separated by commas. You can use CSV files to: • download pack slip information from the Vendor Portal: see *Pack Slip CSV File* • upload shipment confirmations to the Vendor Portal: see the *Purchase Order Shipping Upload* screen • upload invoices to the Vendor Portal: see the *Invoice Upload* screen You can use a spreadsheet application such as Microsoft Excel to work with CSV files.
out-of-balance	An invoice detail line is out-of-balance if you change the unit price from the original purchase order unit price by more than the threshold specified by the retailer: for example, the retailer sets a threshold of 10%, and you change the unit price by 15%. Any change to unit price, either higher or lower than the original unit price, triggers out-of-balance evaluation. When you submit the invoice, it does not post automatically to the retailer’s system; instead, it remains in **Held** status until the retailer either approves or rejects it. The out-of-balance icon ( ) at the *Invoice* screen indicates if the invoice detail line is currently out-of-balance.

Term	Description
status: purchase order or purchase order line	Possible purchase order and purchase order line statuses are: • **Cancelled:** The retailer has cancelled the line or the purchase order. • **Complete (multi-line purchase orders only):** The purchase order includes more than one line, and the line statuses include a combination of **Cancelled** and **Shipped**; there are no remaining open lines. • **Held:** You have held the line(s) on the purchase order from processing. You might put a line on hold if you cannot fulfill it, and are requesting that the retailer cancel it. When a line on a purchase order is on hold, it is not eligible for pack slip generation; or, if a pack slip has already been generated, the line is not eligible for shipment confirmation, and if you use the void/reprint option, the held line is omitted from the new pack slip. • **In Process:** You have generated pack slips for the purchase order or line. • **New Order:** You have not yet generated pack slips for the purchase order or line. • **Open (multi-line purchase orders only):** The purchase order includes more than one line, and the line statuses include at least one line that is **Held**, **In Process**, or **New Order**. • **Shipped:** You have confirmed shipment of the purchase order or line.
status: invoice	Possible invoice statuses are: • **Approved** = The invoice was approved, either automatically or by the retailer, but has not yet posted to the retailer's system. An invoice ordinarily remains in Approved status for a very short time before it is posted. • **Held** = You have submitted the invoice to the retailer, and the invoice includes at least one line that is **out-of-balance**. The invoice remains in Held status until the retailer approves or rejects it. • **New** = You selected the **Update and Save for Changes** option at the *Create Invoice Confirmation* window, and have not yet submitted the invoice for posting to the retailer's system. • **Posted** = The invoice has been posted to the retailer's system for payment processing. • **Rejected** = You submitted an invoice that includes an out-of-balance line to the retailer, and the retailer has rejected it. You can change the invoice so that it no longer contains an out-of-balance line, or you can delete the invoice.
vendor integration	An option that enables a vendor's system to communicate directly with the Vendor Portal rather than requiring the vendor to use the Vendor Portal screens for some common tasks. See *Integrated Vendor Process Flow* for more information.

Language and localization

The *Data Formats options* fields at the **Vendor Configuration** screen control:

- the language to use on pullsheets and for emails to your organization
- the date/time and numeric formats to use on pullsheets, for system-generated emails to your organization, and on Vendor Portal screens
- The language displayed on Vendor Portal screens is controlled by the locale code appended to the URL for the Vendor Portal.
- The Vendor Portal link embedded in emails opens the Vendor Portal using the default locale for the retailer, which may differ from the **Language** defined at the **Vendor Configuration** screen.